



Element Education

Governing Board Meeting

Published on June 23, 2026 at 6:16 AM PDT

Amended on June 23, 2026 at 8:14 AM PDT

Date and Time

Friday June 26, 2026 at 11:30 AM PDT

Location

1441 Montiel Road
#145
Escondido, CA 92026

The Governing Board ("Board") will assemble in person at 1441 Montiel Road, Ste 145, Escondido, CA 92026. Employees of Element Education who will be presenting and anyone wishing to speak during public comment may do so in person or via the MS Teams platform by clicking on the link provided below.

Members of the public who wish to comment during the Board meeting may complete the [Public Comment Speaker Card](#). In general, individual speakers are permitted three minutes to address the Board on each agenda or non-agenda item. The Board will limit the total time for public input on each item to 15 minutes per side (approve/deny) of the topic. In exceptional circumstances, the Board President may, with Board consent, adjust the amount of time allowed for public input and/or the time allotted for each speaker. Any such adjustment shall be made equitably to allow for a diversity of viewpoints. The President may also stipulate that speakers not repeat arguments already made by other speakers to allow for broader range of input.

[Digital Sign- In Sheet](#)

[Join the Meeting: Use this Link to log on.](#)

**1441 Montiel Road #145
Escondido, CA 92026**

PURPOSE

The purpose of Element Education, Inc. (EEI) is to develop and operate charter schools which create avenues for “new instruction, new management, and new governance in public schools.” The organization operates from a place of Servant Leadership in supporting the elements of personalized learning.

VISION

The vision of EEI is to create model programs for deep and meaningful learning and attract and develop innovative and effective educators who instill the mindset and skills for developing agency in, and ownership of, life-long learning.

MISSION

The mission of its schools and programs is to promote a culture of mastery, autonomy, and purpose for all stakeholders through personalized learning plans developed with insight and experience of learning styles, appropriate resources, and learning networks for success in work, life, and citizenship.

Agenda

Purpose Presenter

I. Opening Items

- A. Call the Meeting to Order
- B. Record Attendance
- C. Oath of Office-Adam Hopps Terri Novacek
- D. Public Comment on Closed Session Item

Members of the public shall have an opportunity to speak in accordance with Government Code section 54954.3 and Education Code section 72121.5

- E. Recess to Closed Session

II. Closed Session

- A. Existing Litigation (§ 54956.9(d)(1))

Purpose Presenter

III. Public Session

- A. Call to Order and Establishment of Quorum
- B. Pledge of Allegiance
- C. Approval of Agenda
- D. Disclosure of Board Actions Taken in Closed Session, pursuant to Government Code §54957.1.

IV. Recognitions and Presentations

- | | | |
|--|-----|--------------|
| A. School Presentation-Community Montessori | FYI | Earl Otte |
| B. School Presentation-Dimensions Collaborative School | FYI | Paul Johnson |
| C. California Department Office of Education (CDE) Local Indicators Report | FYI | Tori Ades |

V. Communications- Agenda and Non-Agneda Items

To participate in the "Public Comment" portion of our meeting, you may use the [Speaker Card](#). As you are writing your comment, please keep in mind that the three-minute time limit still applies to all comments, even if they are being read by someone else.

- | | |
|-------------------------|-----|
| A. Public | FYI |
| B. Members of the Board | FYI |

VI. Approval of Consent Items

Items listed in this section are considered routine and are acted on by the Board in one motion. It is understood that the Executive Director recommends approval of all Consent Items. Each item on the Consent agenda approved by the Board shall be deemed to have been considered in full and adopted as recommended.

- | | | |
|---|------|---------------|
| A. Approval of the Regular Board Meeting Minutes on May 22, 2026. | | Terri Novacek |
| B. Approval of Check Run for May 2026. | Vote | Terri Novacek |

VII. Information Item-Chief Business Officer Report

	Purpose	Presenter
A. Financial Position of Schools	FYI	Doug Miller
B. Technology Report	FYI	Doug Miller
VIII. Information Item-Director of Human Resources Report		
A. Employment Activity	FYI	Kiran Sihota
B. Professional Learning Activity (external)	FYI	Kiran Sihota
IX. Information Item-Chief Operations Officer Report		
A. Facilities Update	FYI	Roland Yung
B. Resource Management	FYI	Roland Yung
X. Executive Director Report		
A. Authorizer Relations	FYI	Terri Novacek
XI. Action Item(s) for Element Education		
A. Consideration of Amendment of Articles of Incorporation	Vote	Terri Novacek
B. Consideration of Resolution Authorizing Preparation and Submission of Charter Renewal Petitions for Community Montessori and Dimensions Collaborative School.	Vote	Terri Novacek
C. Consideration of the 26-27 Employment Manual	Vote	Terri Novacek
XII. Action Items for Community Montessori		
A. Consideration of Proposition 28 Annual Report	Vote	Terri Novacek
B. Consideration of FY25-26 EPA Resolution	Vote	Terri Novacek
C. Consideration of the 26-27 Local Control and Accountability Plan (LCAP)	Vote	Terri Novacek
D. Consideration of FY26-27 Adopted Budget	Vote	Terri Novacek
XIII. Action Items for Dimensions Collaborative School		

	Purpose	Presenter
A. Consideration of Proposition 28 Annual Report	Vote	Terri Novacek
B. Consideration of FY25-26 EPA Resolution	Vote	Terri Novacek
C. Consideration of the 26-27 Local Control and Accountability Plan (LCAP)	Vote	Terri Novacek
D. Consideration of FY26-27 Adopted Budget	Vote	Terri Novacek

XIV. Future Agenda Items

Items for next Agenda (Future Agenda items are not considered on the agenda and Board Members will not be able to discuss per the Brown Act)

XV. Next Meeting

July 24, 2026
Administrative Offices
1441 Montiel Road #145
Escondido, CA 92026
11:30 AM Closed Meeting
12:00 PM Public Meeting

XVI. Closing Items

- A.** Adjourn Meeting

Brown Act Compliance

This agenda was posted in accordance with the requirements of the Ralph M. Brown Act and California Government Code Section 54954.2.

Disability Access

In compliance with the Americans with Disabilities Act of 1990, if you need special assistance to participate in this meeting, please contact Element Education, Inc. at least 48 hours before the meeting so that reasonable arrangements can be made to ensure accessibility. Contact Susan Michaels at 760-703-9997 or smichaels@myelement.org if you should need any special accommodations.

Agenda Materials

Copies of the agenda and supporting materials are available for public review at the Administrative Office located at 1441 Montiel Road, Suite 143, Escondido, CA 92026, and may also be available on the organization's website. Contact Susan Michaels at smichaels@myelement.org.

Coversheet

School Presentation-Community Montessori

Section: IV. Recognitions and Presentations
Item: A. School Presentation-Community Montessori
Purpose: FYI
Submitted by:
Related Material: School Report June 2026.pdf



June 2026

Current Projects	<ul style="list-style-type: none">• Final LCAP adjustments• Charter Renewal• Analyzing feedback from staff end of year survey• Analyzing CAASPP Results• Refining our Math Focus plan for next school year• Interviewing for open positions• Preparing for Kickoff week
-------------------------	---



Current Projects	<ul style="list-style-type: none">• Final LCAP adjustments• Updating CA School Dashboard Local Indicators• Charter Renewal• Analyzing feedback from staff end of year survey• Analyzing CAASPP Results• Interviewing for open positions• Preparing for Kickoff week
-------------------------	---

Coversheet

School Presentation-Dimensions Collaborative School

Section: IV. Recognitions and Presentations
Item: B. School Presentation-Dimensions Collaborative School
Purpose: FYI
Submitted by:
Related Material: School Report June 2026.pdf



June 2026

Current Projects	<ul style="list-style-type: none">• Final LCAP adjustments• Charter Renewal• Analyzing feedback from staff end of year survey• Analyzing CAASPP Results• Refining our Math Focus plan for next school year• Interviewing for open positions• Preparing for Kickoff week
-------------------------	---



Current Projects	<ul style="list-style-type: none">• Final LCAP adjustments• Updating CA School Dashboard Local Indicators• Charter Renewal• Analyzing feedback from staff end of year survey• Analyzing CAASPP Results• Interviewing for open positions• Preparing for Kickoff week
-------------------------	---

Coversheet

Approval of the Regular Board Meeting Minutes on May 22, 2026.

Section: VI. Approval of Consent Items
Item: A. Approval of the Regular Board Meeting Minutes on May 22, 2026.
Purpose:
Submitted by: Terri Novacek
Related Material: 2026_05_22_board_meeting_minutes (4).pdf

BACKGROUND:

In accordance with the Brown Act, minutes are recorded at every Board meeting. The minutes are typed and presented to the Board at the following meeting for review and approval.

The meeting minutes for the May 22, 2026, Board Meeting are provided here for Board review.

RECOMMENDATION:

Approve the May 22, 2026, Board Meeting Minutes.

DRAFT



Element Education

Minutes

Governing Board Meeting

Date and Time

Friday May 22, 2026 at 11:30 AM

Location

1441 Montiel Road #145
Escondido, CA 92026

Directors Present

A. Schaner, B. Rohrer, C. Nunley, L. Cavazos, S. Subramanya, T. Breckenridge

Directors Absent

None

Guests Present

S. Michaels, T. Novacek

I. Opening Items

A. Call the Meeting to Order

C. Nunley called a meeting of the board of directors of Element Education to order on Friday May 22, 2026 at 11:31 AM.

Board Member Schaner arrived at 11:32 a.m.

Board Member Subramanya arrived at 11:40 a.m.

B. Record Attendance

C. Public Comment on Closed Session item

No comments from the public.

D. Recess to Closed Session

Board recessed to Closed Session at 11:33 a.m.

II. Public Session

A. Call to Order and Establishment of Quorum

The Regular Meeting was called to order at 12:12 p.m., and a quorum was established.

B. Pledge of Allegiance

Board Member Subramanya led the Pledge of Allegiance.

C. Approval of Agenda

A. Schaner made a motion to approve the agenda with the addition of Agenda Item XIV E: Consideration of HVAC Replacement for Santee Learning Center.

S. Subramanya seconded the motion.

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

Roll Call

S. Subramanya Aye

T. Breckenridge Aye

B. Rohrer Aye

L. Cavazos Aye

A. Schaner Aye

C. Nunley Aye

D. Disclosure of Board Actions Taken in Closed Session, pursuant to Government Code §54957.1.

Board President Nunley shared that the Board was pleased to announce that an agreement had been reached with Element Education Executive Director candidate Roland Yung. The Board formally approved offering Mr. Yung a three-and-a-half-year contract to serve as Element's next Executive Director. Roland Yung will officially assume the role on January 1, 2027.

Closed session action- revise contract with 12/31 expiration and salary aligned with updated salary matrix.

III. Recognitions and Presentations

A.

Staff

Mr. Yung recognized Marvin Soares, Custodian and Maintenance, for his exceptional work in preparing for the San Diego County Office of Education's May site visit.

B. Programs

Ms. Sestina highlighted the Social and Emotional Learning (SEL) Program and recognized the staff members whose collaboration and dedication have supported its implementation, including Catherine Khajavi, School Psychologist; Arlene Chousmith, School Psychologist; Brandi Rodrigues, Student Support Manager; Cerrah Vondersaar, Student Support Manager; Courtney Federoff, Speech Language Pathologist; Lauren Donatelli, Special Education Program Manager; Lindsey Monforte, Behavior Technician; Lois Ingber, Behavioral Counselor; Mikaela Martin, Occupational Therapist; Nicole Warner, Education Specialist; and Vidya Ramesh, Speech and Language Pathologist.

C. School Presentation-Community Montessori

Mr. Otte presented updates and activities within CM.

D. Advisory Council Report

Kristen Kurtz shared the CM Advisory Council meeting report with the Board.

E. School Presentation-Dimensions Collaborative School

Mr. Johnson presented updates and activities within DCS.

F. Advisory Council Report - Dimensions Collaborative School

Danielle Stubbs shared the DCS Advisory Council meeting report with the Board.

G. Dimensions Collaborative School - Career and Technical Education Presentation

Greg Hawkins shared a Career and Technical Education Presentation with the Board.

IV. Communications- Agenda and Non-Agenda Items

A. Public

Board President Nunley shared the Board received 12 written public comments regarding the need for a shade structure at the Community Montessori Carlsbad Learning Center.

The comments were distributed to the Board and entered into the record.

Because this item was not agendaized, the Board could not discuss or take action at this meeting.

Staff may follow up and determine whether this should return as a future agenda item.

B.

Members of the Board

Ms. Novacek shared that Board Member Schaner will conclude her term in June and thanked her for her service and support.

On behalf of the Element Education Governing Board, Board Member Schaner expressed her condolences to the victims and their families following the recent shooting at the Islamic Center in San Diego.

V. Approval of Consent Items

A. Approval of the Regular Board Meeting Minutes on April 24, 2026.

L. Cavazos made a motion to approve the minutes from Governing Board Meeting on 04-24-26.

T. Breckenridge seconded the motion.

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

Roll Call

S. Subramanya Aye
C. Nunley Aye
T. Breckenridge Aye
A. Schaner Aye
B. Rohrer Aye
L. Cavazos Aye

B. Approval of the Special Board Meeting Minutes on May 15, 2026.

L. Cavazos made a motion to approve the minutes from Governing Board Special Meeting on 05-15-26.

T. Breckenridge seconded the motion.

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

Roll Call

S. Subramanya Aye
A. Schaner Aye
B. Rohrer Aye
C. Nunley Aye
T. Breckenridge Aye
L. Cavazos Aye

C. Approval of Check Run for April 2026.

L. Cavazos made a motion to approve Check Run for April 2026.

T. Breckenridge seconded the motion.

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

Roll Call

B. Rohrer Aye

Roll Call

C. Nunley Aye
T. Breckenridge Aye
L. Cavazos Aye
A. Schaner Aye
S. Subramanya Aye

VI. Information Item-Chief Business Officer Report

A. Financial Position of Schools

Mr. Miller presented current financial information for Community Montessori and Dimensions Collaborative School.

B. Technology Report

Mr. Miller reported on recent technology projects and updates.

VII. Information Item-Director of Human Resources Report

A. Employment Activity

Ms. Sihota reviewed her written report on recent hires and current openings.

B. Professional Learning Activity (external)

Ms. Sihota reviewed her written report on employees who engaged in formal professional learning since the last board meeting.

VIII. Information Item-Chief Operations Officer Report

A. Facilities Update

Mr. Yung reported on the status of recent facility improvements.

B. Resource Management

Mr. Yung shared a report on resource management projects and improvements.

IX. Executive Director Report

A. Authorizer Relations

Ms. Novacek shared it was a pleasure hosting SDCOE Board Members Mr. Gregg Robinson and Ms. Alicia Munoz at the DCS Mission Valley Learning Center earlier this month. Ms. Novacek shared the SDCOE team reviewed the 25-26 First Interim Reports

for Community Montessori and Dimensions Collaborative School and both schools are in good standing.

X. Public Hearing: Local Control and Accountability Plan (LCAP) for Community Montessori

A. Review of Procedures for Public Hearing

Board President Nunley opened the Public Hearing regarding the 2026–2027 Local Control and Accountability Plan (LCAP) for Community Montessori. Opportunity for public comment was provided; no public comments were received. Mr. Otte presented the Community Montessori draft LCAP to the Board. Board President Nunley closed the Public Hearing.

XI. Public Hearing: Local Control and Accountability Plan (LCAP) for Dimensions Collaborative School

A. Review of Procedures for Public Hearing

Board President Nunley opened the Public Hearing regarding the 2026–2027 Local Control and Accountability Plan (LCAP) for Dimensions Collaborative School. Opportunity for public comment was provided; no public comments were received. Mr. Johnson presented the Dimensions Collaborative School draft LCAP to the Board. Board President Nunley closed the Public Hearing.

XII. Annual Board Elections

A. Consideration and Possible Appointment/Reappointment of Governing Board Members for the 2026–2027 School Year

The Board considered nominations for Board membership. The following individuals were nominated for board service:

- Chris Nunley-Returning Member
- Suhas Subramanya-Returning Member
- Adam Hopps- New Member and Community Montessori Parent Representative

A. Schaner made a motion to approve the appointment/election of the nominated individuals to the Board.

L. Cavazos seconded the motion.

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

Roll Call

T. Breckenridge Aye

A. Schaner Aye

C. Nunley Aye

Roll Call

L. Cavazos Aye
S. Subramanya Aye
B. Rohrer Aye

XIII. Action Item(s) for Element Education

A. Approval of Revised Certificated Compensation Matrix

S. Subramanya made a motion to approve the Revised Certificated Compensation Matrix.

T. Breckenridge seconded the motion.

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

Roll Call

S. Subramanya Aye
A. Schaner Aye
B. Rohrer Aye
C. Nunley Aye
T. Breckenridge Aye
L. Cavazos Aye

B. Approval of Revised Classified Compensation Matrix

A. Schaner made a motion to approve the Revised Classified Compensation Matrix.

S. Subramanya seconded the motion.

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

Roll Call

C. Nunley Aye
B. Rohrer Aye
A. Schaner Aye
L. Cavazos Aye
S. Subramanya Aye
T. Breckenridge Aye

C. Approval of Executive & Administrative Leadership Salary Matrix

T. Breckenridge made a motion to approve the Executive & Administrative Leadership Salary Matrix.

L. Cavazos seconded the motion.

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

Roll Call

A. Schaner Aye
B. Rohrer Aye
S. Subramanya Aye
T. Breckenridge Aye
L. Cavazos Aye

Roll Call

C. Nunley Aye

D. Approval of Enhanced Employee Health Benefit Contributions

S. Subramanya made a motion to approve the Enhanced Employee Health Benefit Contributions.

A. Schaner seconded the motion.

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

Roll Call

A. Schaner Aye

L. Cavazos Aye

B. Rohrer Aye

C. Nunley Aye

T. Breckenridge Aye

S. Subramanya Aye

E. Approval of HVAC Replacement for the Santee Learning Center

S. Subramanya made a motion to approve the HVAC Replacement for the Santee Learning Center.

T. Breckenridge seconded the motion.

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

Roll Call

B. Rohrer Aye

L. Cavazos Aye

A. Schaner Aye

C. Nunley Aye

S. Subramanya Aye

T. Breckenridge Aye

XIV. Future Agenda Items

A. June 26, 2026 Agenda Items

Charter Petition Renewal

XV. Closing Items

A. Adjourn Meeting

L. Cavazos made a motion to adjourn meeting.

T. Breckenridge seconded the motion.

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

Roll Call

T. Breckenridge Aye

A. Schaner Aye

S. Subramanya Aye

L. Cavazos Aye

C. Nunley Aye

B. Rohrer Aye

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 1:40 PM.

Respectfully Submitted,

C. Nunley

Coversheet

Approval of Check Run for May 2026.

Section: VI. Approval of Consent Items
Item: B. Approval of Check Run for May 2026.
Purpose: Vote
Submitted by: Doug Miller
Related Material: May 2026 Check Run.pdf

BACKGROUND:

The Chief Business Officer provides a report on the status of the organization's finances monthly.

Enclosed is the May 2026 check run for Board review.

RECOMMENDATION:

Approve the May 2026 check run.

ESP-CA
EdTec Network : Element Education, Inc.
AP Bill Payments
May 1, 2026 - May 31, 2026
A listing of bill payments

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
Accounts Payable							\$0.00	\$0.00	
	5/1/2026	111927	Airshine Music School LLC	179214 Airshine Music School LLC	512640069			\$600.00	Bill Payment
	5/1/2026	111928	Alison's Montessori	24664 Alison's Montessori	Customer ID 13324			\$159.00	Bill Payment
	5/1/2026	111929	Allen, Andrew	140327 Allen, Andrew	512640082			\$2,600.00	Bill Payment
	5/1/2026	111930	Amazon Capital Services	177857 Amazon Capital Services	A1EJCAJXOWH87N			\$4,853.96	Bill Payment
	5/1/2026	111931	Arashi Brazilian Jiu-jitsu	194017 Arashi Brazilian Jiu-jitsu	512640079			\$920.00	Bill Payment
	5/1/2026	111932	Art with Larisse	21467 Art with Larisse	512640081			\$224.00	Bill Payment
	5/1/2026	111933	Associated Students of SDSU	226013 Associated Students of SDSU	28944			\$1,190.00	Bill Payment
	5/1/2026	111934	AT&T - 9391084563	216673 AT&T - 9391084563	9391084563; Santee			\$31.91	Bill Payment
	5/1/2026	111935	AT&T - 9391084564	216670 AT&T - 9391084564	9391084564; Poway			\$31.91	Bill Payment
	5/1/2026	111936	AT&T - 9391084565	216672 AT&T - 9391084565	9391084565; Mary Lane			\$39.34	Bill Payment
	5/1/2026	111937	AT&T - 9391084566	216671 AT&T - 9391084566	9391084566; Poway			\$31.91	Bill Payment
	5/1/2026	111938	Beyond Vision Center Optometry	201064 Beyond Vision Center Optometry	03/27, 04/03, & 04/17/2026			\$840.00	Bill Payment
	5/1/2026	111939	Caster Family Trust	60587 Caster Family Trust	22403 - #7588 03/04/26-04/01/26			\$184.20	Bill Payment
	5/1/2026	111940	Centricity	205957 Centricity	292726-1			\$275.95	Bill Payment
	5/1/2026	111941	City of Escondido - Utility Billing	21840 City of Escondido - Utility Billing	02/24/26-03/24/26 - Mary Lane			\$404.30	Bill Payment
	5/1/2026	111942	Cox Communications - Midway	222295 Cox Communications - Midway	001 3410 074203702			\$661.70	Bill Payment
	5/1/2026	111943	CSR Plumbing Inc.	117634 CSR Plumbing Inc.	49904			\$680.00	Bill Payment
	5/1/2026	111944	EDCO Waste & Recycling Service	70448 EDCO Waste & Recycling Service	04/30/26 - 25-5A 043413			\$285.65	Bill Payment
	5/1/2026	111945	EMH Sports USA, Inc.	22389 EMH Sports USA, Inc.	2355-9977-04			\$900.00	Bill Payment
	5/1/2026	111946	Escondido Disposal Inc.	21568 Escondido Disposal Inc.	04/30/2026 - 53-ED 184837			\$345.17	Bill Payment
	5/1/2026	111947	First Congregational Church of Escondido	21507 First Congregational Church of Escondido	March 2026 Utilities			\$3,184.42	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/1/2026	111948	Front Row Center Inc	196896	Front Row Center Inc	512640085		\$2,094.23	Bill Payment
	5/1/2026	111949	Goral Music LLC	224026	Goral Music LLC	512640087		\$225.00	Bill Payment
	5/1/2026	111950	Guided Discoveries, Inc.	23092	Guided Discoveries, Inc.	1989		\$5,520.00	Bill Payment
	5/1/2026	111951	Happy Minds Tutoring	225366	Happy Minds Tutoring	512640089		\$300.00	Bill Payment
	5/1/2026	111952	Indie Sol Enrichment	212264	Indie Sol Enrichment	512640091		\$450.00	Bill Payment
	5/1/2026	111953	Inspire School Of Ballet, LLC	79130	Inspire School Of Ballet, LLC	512640094		\$246.00	Bill Payment
	5/1/2026	111954	Institute for Effective Education	216563	Institute for Effective Education	CAVJan31		\$11,542.86	Bill Payment
	5/1/2026	111955	JJJ Enterprises	22336	JJJ Enterprises	DEHES		\$2,010.00	Bill Payment
	5/1/2026	111956	JN Music Studio	211656	JN Music Studio	512640095		\$1,500.00	Bill Payment
	5/1/2026	111957	Jostens	24393	Jostens	39674970		\$40.02	Bill Payment
	5/1/2026	111958	Literacy Resources, LLC	157088	Literacy Resources, LLC	INV-260422-0220815		\$57.26	Bill Payment
	5/1/2026	111959	Lloyd Pest Control	24272	Lloyd Pest Control	9232679		\$131.00	Bill Payment
	5/1/2026	111960	Matuszczak, Anna M.	176883	Matuszczak, Anna M.	512640077		\$980.00	Bill Payment
	5/1/2026	111961	Miller Music Academy	219851	Miller Music Academy	512640098		\$460.00	Bill Payment
	5/1/2026	111962	Morrey, Cathrine	169917	Morrey, Cathrine	CM20260430		\$2,385.00	Bill Payment
	5/1/2026	111963	Office Depot, Inc.	29703	Office Depot, Inc.	466863040001		\$839.31	Bill Payment
	5/1/2026	111964	Perpetual Motion Solutions, Inc.	144922	Perpetual Motion Solutions, Inc.	512640101		\$522.00	Bill Payment
	5/1/2026	111965	Pitney Bowes	21496	Pitney Bowes	8000-9090-0131-7531		\$557.90	Bill Payment
	5/1/2026	111966	Que Tal Spanish	23682	Que Tal Spanish	42926		\$1,260.00	Bill Payment
	5/1/2026	111967	Rockin' L&D Equine Education Services	128816	Rockin' L&D Equine Education Services	512640100		\$525.00	Bill Payment
	5/1/2026	111968	San Diego County Office of Education	28181	San Diego County Office of Education	099-053434		\$77.00	Bill Payment
	5/1/2026	111969	SoCal Chess Academy LLC	195954	SoCal Chess Academy LLC	512640102		\$520.00	Bill Payment
	5/1/2026	111970	Specialized Therapy Services	21769	Specialized Therapy Services	ELMT02- 0326		\$2,091.75	Bill Payment
	5/1/2026	111971	Sunshine Studio LLC	208065	Sunshine Studio LLC	512640104		\$120.00	Bill Payment
	5/1/2026	111972	Teacher Synergy, LLC	128713	Teacher Synergy, LLC	335508615		\$42.00	Bill Payment
	5/1/2026	111973	Twitchell, Laura	178237	Twitchell, Laura	512640084		\$1,920.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/1/2026	111974	UC Regents	226014 UC Regents	04212602			\$620.00	Bill Payment
	5/7/2026	111975	5 Element Martial Arts & Wellness Center, LLC	129398 5 Element Martial Arts & Wellness Center, LLC	512644504			\$530.00	Bill Payment
	5/7/2026	111976	All About Learning Press, Inc.	23484 All About Learning Press, Inc.	946777			\$338.28	Bill Payment
	5/7/2026	111977	Amazon Capital Services	177857 Amazon Capital Services	A1EJCAJXOWH87N			\$2,598.16	Bill Payment
	5/7/2026	111978	AMF Bowling Centers, Inc.	226121 AMF Bowling Centers, Inc.	BEO# 686-7907			\$1,378.74	Bill Payment
	5/7/2026	111979	Barnes & Noble, Inc.	21811 Barnes & Noble, Inc.	Account 6849012			\$184.03	Bill Payment
	5/7/2026	111980	Belardino, Debora	224528 Belardino, Debora	512644507			\$240.00	Bill Payment
	5/7/2026	111981	Calming Bee	195103 Calming Bee	512644505			\$225.00	Bill Payment
	5/7/2026	111982	Carolina Biological Supply Company	23097 Carolina Biological Supply Company	1504992			\$30.65	Bill Payment
	5/7/2026	111983	Catalina Island Camps, Inc.	140328 Catalina Island Camps, Inc.	5/7/26 - Cabin Flaps & Doors Replacement			\$1,000.00	Bill Payment
	5/7/2026	111984	Cavazos, Leila (P)	213650 Cavazos, Leila (P)	April 2026			\$120.00	Bill Payment
	5/7/2026	111985	Colleen Mickey	223721 Colleen Mickey	512644510			\$260.00	Bill Payment
	5/7/2026	111986	Comiskey, Lorry	154244 Comiskey, Lorry	04/27-30/2026 - Fundraiser Reimbursement			\$85.84	Bill Payment
	5/7/2026	111987	Corodata Records Management, Inc.	88977 Corodata Records Management, Inc.	016540			\$229.43	Bill Payment
	5/7/2026	111988	EdTec Inc.	21820 EdTec Inc.	CINV-00015997			\$879.82	Bill Payment
	5/7/2026	111989	GoTo Communications Inc.	47378 GoTo Communications Inc.	IN7105370412			\$931.82	Bill Payment
	5/7/2026	111990	Hammersmith LLC	226176 Hammersmith LLC	512644506			\$2,070.00	Bill Payment
	5/7/2026	111991	Homeschool Spanish Academy Inc	134442 Homeschool Spanish Academy Inc	2025-2026 (02)			\$1,016.91	Bill Payment
	5/7/2026	111992	Knight Security & Fire Systems	179525 Knight Security & Fire Systems	241552			\$352.00	Bill Payment
	5/7/2026	111993	Korte, Kimberly	208293 Korte, Kimberly	February & March 2026			\$724.00	Bill Payment
	5/7/2026	111994	Lawlipop Electric Inc	226175 Lawlipop Electric Inc	26130			\$403.29	Bill Payment
	5/7/2026	111995	LearnersByNature	163680 LearnersByNature	512644508			\$3,500.00	Bill Payment
	5/7/2026	111996	Lederman, Jenica	214573 Lederman, Jenica	March & April 2026			\$473.00	Bill Payment
	5/7/2026	111997	Leonard, Karin	24291 Leonard, Karin	512644509			\$220.00	Bill Payment
	5/7/2026	111998	Literacy Resources, LLC	157088 Literacy Resources, LLC	INV-260422-0220814			\$203.36	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/7/2026	111999	Mendiola, April	184288 Mendiola, April	April 2026			\$543.15	Bill Payment
	5/7/2026	112000	Noonan Family Swim School - San Diego	24570 Noonan Family Swim School - San Diego	512644512			\$924.00	Bill Payment
	5/7/2026	112001	Nunley, Chris	206872 Nunley, Chris	April 2026			\$120.00	Bill Payment
	5/7/2026	112002	Office Depot, Inc.	29703 Office Depot, Inc.	465590878002			\$2,080.65	Bill Payment
	5/7/2026	112003	Otte, Samantha	164709 Otte, Samantha	1570			\$2,799.00	Bill Payment
	5/7/2026	112004	Peterson, Shannon	165747 Peterson, Shannon	512644511			\$495.00	Bill Payment
	5/7/2026	112005	Portal Languages - San Diego	223478 Portal Languages - San Diego	512644513			\$550.00	Bill Payment
	5/7/2026	112006	Rohrer, Barbara	21829 Rohrer, Barbara	March 2026			\$120.00	Bill Payment
	5/7/2026	112007	Safe Swim Academy	194022 Safe Swim Academy	512644514			\$800.00	Bill Payment
	5/7/2026	112008	Schools First Plan Admin LLC	164605 Schools First Plan Admin LLC	05/05/2026 403B			\$24,728.40	Bill Payment
	5/7/2026	112009	Schweizer, Rachel	225569 Schweizer, Rachel	September 2025 - February 2026 - Shuebox Educational Services			\$840.00	Bill Payment
	5/7/2026	112010	Silva & Silva CPA's	172545 Silva & Silva CPA's	26-2094			\$9,900.00	Bill Payment
	5/7/2026	112011	Soto, Karina	223971 Soto, Karina	April 2026			\$280.00	Bill Payment
	5/7/2026	112012	Terry Breckenridge	218940 Terry Breckenridge	April 2026			\$120.00	Bill Payment
	5/7/2026	112013	Top Notch Catering, LLC	141278 Top Notch Catering, LLC	CM052601			\$19,558.79	Bill Payment
	5/7/2026	112014	Transparent Classroom	94945 Transparent Classroom	128291			\$1,436.80	Bill Payment
	5/7/2026	112015	US Music Lessons	225364 US Music Lessons	512644515			\$510.00	Bill Payment
	5/7/2026	112016	Vishwanathan, Gayathri	226172 Vishwanathan, Gayathri	5/6/26 - Fundraiser Supply Reimbursement			\$398.46	Bill Payment
	5/7/2026	112017	Waste Management of El Cajon - San Diego	24317 Waste Management of El Cajon - San Diego	Account 131-0192896-1584-1			\$329.10	Bill Payment
	5/7/2026	112018	Werner, Mathew	71986 Werner, Mathew	04/30/26 - Freeform Clay Reimbursement			\$65.00	Bill Payment
	5/7/2026	112019	Xerox - Business Solutions	224536 Xerox - Business Solutions	LC5253905			\$43.21	Bill Payment
	5/7/2026	112020	Ze Roberto Futbol Academy	220979 Ze Roberto Futbol Academy	512644516			\$759.00	Bill Payment
	5/14/2026	112021	Sebastiao, Debra	226441 Sebastiao, Debra	Final Check 1			\$1,967.20	Bill Payment
	5/14/2026	112022	Sebastiao, Debra	226441 Sebastiao, Debra	Final Check 2			\$184.20	Bill Payment
	5/15/2026	112023	Abdelrehim, Abdallah	135402 Abdelrehim, Abdallah	05/06/26 - Gas Reimbursement			\$45.01	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/15/2026	112024	Aelott Air Conditioning	23742 Aelott Air Conditioning	200390903			\$279.00	Bill Payment
	5/15/2026	112025	Amazon Capital Services	177857 Amazon Capital Services	A1EJCAJXOWH87N			\$4,312.02	Bill Payment
	5/15/2026	112026	AT&T - 9391084658	218212 AT&T - 9391084658	000025195435			\$31.91	Bill Payment
	5/15/2026	112027	Cintas Corporation #055	102194 Cintas Corporation #055	04/30/2026			\$3,346.27	Bill Payment
	5/15/2026	112028	Cox Communications San Diego - Ste 143	21426 Cox Communications San Diego - Ste 143	001 3410 110240101			\$403.20	Bill Payment
	5/15/2026	112029	Donna Shott (P)	223128 Donna Shott (P)	January-March 2026			\$168.00	Bill Payment
	5/15/2026	112030	Escondido Disposal Inc.	21568 Escondido Disposal Inc.	04/30/2026 - 53-ED 177875			\$323.39	Bill Payment
	5/15/2026	112031	ExploreLearning	216139 ExploreLearning	CI-00684545			\$3,295.00	Bill Payment
	5/15/2026	112032	Gemstone Gymnastics	208920 Gemstone Gymnastics	512647361			\$2,070.50	Bill Payment
	5/15/2026	112033	Hofman Planning & Engineering	35355 Hofman Planning & Engineering	2270			\$3,566.25	Bill Payment
	5/15/2026	112034	Institute for Effective Education	216563 Institute for Effective Education	ECWIN0332			\$11,542.86	Bill Payment
	5/15/2026	112035	Isolved Benefit Services	21680 Isolved Benefit Services	1153608572			\$95.10	Bill Payment
	5/15/2026	112036	Knight Security & Fire Systems	179525 Knight Security & Fire Systems	242631			\$150.00	Bill Payment
	5/15/2026	112037	LearnersByNature	163680 LearnersByNature	512647363			\$105.00	Bill Payment
	5/15/2026	112038	Lloyd Pest Control	24272 Lloyd Pest Control	9246788			\$110.00	Bill Payment
	5/15/2026	112039	Marsh & McLennan Agency LLC	27901 Marsh & McLennan Agency LLC	Element Education, Inc.			\$3,516.00	Bill Payment
	5/15/2026	112040	Marsi Carr's Music	53317 Marsi Carr's Music	512647364			\$160.00	Bill Payment
	5/15/2026	112041	Menchaca, Jesse D	30449 Menchaca, Jesse D	26-0513			\$1,450.00	Bill Payment
	5/15/2026	112042	Multi-Health Systems Inc.	111373 Multi-Health Systems Inc.	SIP00639142			\$150.00	Bill Payment
	5/15/2026	112043	North County Student Transportation	200841 North County Student Transportation	26-0557			\$3,349.70	Bill Payment
	5/15/2026	112044	Office Depot, Inc.	29703 Office Depot, Inc.	465058264001			\$183.57	Bill Payment
	5/15/2026	112045	Old Town Trolley Tours of San Diego	201259 Old Town Trolley Tours of San Diego	5/21/26 - CM Carlsbad Field Trip			\$442.00	Bill Payment
	5/15/2026	112046	Open Door Spanish	219908 Open Door Spanish	512647368			\$25.00	Bill Payment
	5/15/2026	112047	Robinson, Rachel	166334 Robinson, Rachel	512647365			\$850.00	Bill Payment
	5/15/2026	112048	San Diego Craft Collective	194023 San Diego Craft Collective	512647369			\$165.00	Bill Payment
	5/15/2026	112049	San Diego Gas & Electric - D.O. (143)	21566 San Diego Gas & Electric - D.O. (143)	0018-9130-2276-8			\$1,834.44	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/15/2026	112050	San Diego Gas & Electric - Mary Lane	21692 San Diego Gas & Electric - Mary Lane	0024-0907-3947-1			\$1,178.34	Bill Payment
	5/15/2026	112051	San Diego Gas & Electric - MV (103B)	187045 San Diego Gas & Electric - MV (103B)	2100-0085-7674-8			\$213.80	Bill Payment
	5/15/2026	112052	San Diego Gas & Electric - MV (PI 101)	187044 San Diego Gas & Electric - MV (PI 101)	2100-0085-9450-1			\$221.24	Bill Payment
	5/15/2026	112053	San Diego Gas & Electric - Oak Hill	72325 San Diego Gas & Electric - Oak Hill	0068-6309-2224-6			\$2,129.49	Bill Payment
	5/15/2026	112054	San Diego Gas & Electric - Suite 145	21567 San Diego Gas & Electric - Suite 145	0003-6390-8776-6			\$742.49	Bill Payment
	5/15/2026	112055	San Diego Gas & Electric- MV (PI 103C)	68352 San Diego Gas & Electric- MV (PI 103C)	0030-4805-3026-3			\$336.48	Bill Payment
	5/15/2026	112056	San Diego Gas & Electric- MV (PI B)	70915 San Diego Gas & Electric- MV (PI B)	0031-8696-4020-2			\$442.93	Bill Payment
	5/15/2026	112057	Santana, Heather (P)	143586 Santana, Heather (P)	April 2026			\$139.00	Bill Payment
	5/15/2026	112058	Schaner, Amy	213541 Schaner, Amy	March 2026			\$120.00	Bill Payment
	5/15/2026	112059	Smith, Ruth	108043 Smith, Ruth	512647366			\$300.00	Bill Payment
	5/15/2026	112060	Smith, Wilborne F.	92544 Smith, Wilborne F.	463094			\$363.21	Bill Payment
	5/15/2026	112061	Softchoice Corporation	22479 Softchoice Corporation	97178401			\$32.27	Bill Payment
	5/15/2026	112062	Subramanya, Suhas	210820 Subramanya, Suhas	April 2026			\$120.00	Bill Payment
	5/15/2026	112063	Sunshine Studio LLC	208065 Sunshine Studio LLC	512647370			\$744.00	Bill Payment
	5/15/2026	112064	Swiftkick Martial Arts Inc	199884 Swiftkick Martial Arts Inc	512647371			\$956.00	Bill Payment
	5/15/2026	112065	Townsley, Margaret	199886 Townsley, Margaret	April 2026			\$100.00	Bill Payment
	5/15/2026	112066	Verbal Behavior Associates	223037 Verbal Behavior Associates	52-0426-01			\$6,946.24	Bill Payment
	5/15/2026	112067	Wilson, Jeremy	181096 Wilson, Jeremy	512647362			\$400.00	Bill Payment
	5/20/2026	112068	Paulsen, Patti	210043 Paulsen, Patti	Final Check			\$589.42	Bill Payment
	5/21/2026	112069	Peretson, Megan	226611 Peretson, Megan	Final Check			\$719.37	Bill Payment
	5/21/2026	112070	Valle-Cota, Silvia	226613 Valle-Cota, Silvia	Final Check			\$894.30	Bill Payment
	5/22/2026	112071	Aelott Air Conditioning	23742 Aelott Air Conditioning	200612073			\$723.00	Bill Payment
	5/22/2026	112072	Alison's Montessori	24664 Alison's Montessori	Customer ID 13324			\$1,921.82	Bill Payment
	5/22/2026	112073	Amazon Capital Services	177857 Amazon Capital Services	A1EJCAJXOWH87N			\$3,182.41	Bill Payment
	5/22/2026	112074	Amira Learning	213894 Amira Learning	SIN032914			\$9,472.50	Bill Payment
	5/22/2026	112075	Amonette-Hinke, Julia	214570 Amonette-Hinke, Julia	512650864			\$1,863.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/22/2026	112076	Aragon, Mikala	184328 Aragon, Mikala	512650865			\$1,065.00	Bill Payment
	5/22/2026	112077	Beben, Whitney (P)	219151 Beben, Whitney (P)	April 2026			\$60.00	Bill Payment
	5/22/2026	112078	Brennan, Julie	25324 Brennan, Julie	512650876			\$475.00	Bill Payment
	5/22/2026	112079	Busy Bees Locks & Keys Inc.	153861 Busy Bees Locks & Keys Inc.	91197609			\$70.69	Bill Payment
	5/22/2026	112080	California School of Music	214571 California School of Music	512650866			\$250.00	Bill Payment
	5/22/2026	112081	Carlsbad Chamber of Commerce	61671 Carlsbad Chamber of Commerce	144084			\$799.00	Bill Payment
	5/22/2026	112082	Carlsbad Police Department - Alarm Unit	190640 Carlsbad Police Department - Alarm Unit	INV-26-6042410			\$39.00	Bill Payment
	5/22/2026	112083	Caster Family Trust	60587 Caster Family Trust	22777 - SDGE #7588 (4/2/26-5/1/26)			\$214.22	Bill Payment
	5/22/2026	112084	Cavazos, Leila (P)	213650 Cavazos, Leila (P)	April 2026 - Leiloni & Mateo			\$296.00	Bill Payment
	5/22/2026	112085	City Of Carlsbad-Utility	78146 City Of Carlsbad- Utility	05012465-00			\$432.13	Bill Payment
	5/22/2026	112086	City of Escondido - Utility Billing	21840 City of Escondido - Utility Billing	03/19/26-04/22/26 - 9491400220			\$425.03	Bill Payment
	5/22/2026	112087	Clark-Burnell, Lisa	154428 Clark-Burnell, Lisa	512650867			\$4,180.00	Bill Payment
	5/22/2026	112088	Covarrubias, Andrea	107977 Covarrubias, Andrea	512650870			\$4,610.00	Bill Payment
	5/22/2026	112089	CubeSmart-Escondido	159327 CubeSmart-Escondido	5003064655			\$519.00	Bill Payment
	5/22/2026	112090	Edudance Classrooms in Motion dba Playground Players Productions	197059 Edudance Classrooms in Motion dba Playground Players Productions	512650869			\$2,125.00	Bill Payment
	5/22/2026	112091	EM Benefits	130538 EM Benefits	06/01/26-06/30/26			\$168.00	Bill Payment
	5/22/2026	112092	Farcas, Emilia	198736 Farcas, Emilia	March & April 2026			\$109.20	Bill Payment
	5/22/2026	112093	First Congregational Church of Escondido	21507 First Congregational Church of Escondido	April 2026 Utilities			\$3,163.26	Bill Payment
	5/22/2026	112094	Garcia, J. Amanda	207336 Garcia, J. Amanda	April 2026			\$105.92	Bill Payment
	5/22/2026	112095	Heifer International	226684 Heifer International	Read to Feed			\$1,220.00	Bill Payment
	5/22/2026	112096	Instant Imprints	177936 Instant Imprints	54554			\$594.34	Bill Payment
	5/22/2026	112097	Jostens	24393 Jostens	39918737			\$43.50	Bill Payment
	5/22/2026	112098	Kajeet, Inc	94972 Kajeet, Inc	INV43218			\$5,354.48	Bill Payment
	5/22/2026	112099	Korte, Kimberly	208293 Korte, Kimberly	April 2026			\$362.00	Bill Payment
	5/22/2026	112100	Learning Journeys Forum, LLC	154427 Learning Journeys Forum, LLC	512650873			\$9,675.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/22/2026	112101	Lee, Kristen Lyn	111361 Lee, Kristen Lyn	512650874			\$375.00	Bill Payment
	5/22/2026	112102	LIVE Online Math	223983 LIVE Online Math	512650875			\$695.00	Bill Payment
	5/22/2026	112103	Longbottom, Mary dba Desert Coast Learning LLC	23672 Longbottom, Mary dba Desert Coast Learning LLC	512650868			\$3,030.00	Bill Payment
	5/22/2026	112104	Marina Village Conference Center	226685 Marina Village Conference Center	8/5/26 - Deposit			\$1,500.00	Bill Payment
	5/22/2026	112105	MetLife - Group Benefits	21837 MetLife - Group Benefits	KM05985459 0001			\$10,358.24	Bill Payment
	5/22/2026	112106	North County Student Transportation	200841 North County Student Transportation	26-0260			\$1,948.00	Bill Payment
	5/22/2026	112107	Padre Dam M.W.D	25063 Padre Dam M.W.D	Acct. 053494-23307550			\$1,039.30	Bill Payment
	5/22/2026	112108	Procopio, Cory, Hargreaves & Savitch LLP	22252 Procopio, Cory, Hargreaves & Savitch LLP	971716			\$19,948.50	Bill Payment
	5/22/2026	112109	Reliance Standard Life Insurance Company	207073 Reliance Standard Life Insurance Company	06/01/26-06/30/26			\$3,321.28	Bill Payment
	5/22/2026	112110	Reliance Standard Life Insurance Company - Vision	213892 Reliance Standard Life Insurance Company - Vision	05/01/26-05/31/26			\$1,001.56	Bill Payment
	5/22/2026	112111	Revia Marketing	219686 Revvia Marketing	1062			\$3,500.00	Bill Payment
	5/22/2026	112112	San Diego Civic Youth Ballet	24824 San Diego Civic Youth Ballet	512650877			\$3,125.00	Bill Payment
	5/22/2026	112113	San Diego Gas & Electric - Santee	23968 San Diego Gas & Electric - Santee	3565 358 888 1			\$1,551.21	Bill Payment
	5/22/2026	112114	San Diego Gas & Electric- Poway	71093 San Diego Gas & Electric- Poway	4768 764 856 5			\$833.61	Bill Payment
	5/22/2026	112115	Santos, Dann	226686 Santos, Dann	5/4/26 - Mileage Reimbursement			\$23.20	Bill Payment
	5/22/2026	112116	Shad Oakes	222302 Shad Oakes	512650878			\$295.00	Bill Payment
	5/22/2026	112117	Shred-it	21500 Shred-it	8014289038			\$138.55	Bill Payment
	5/22/2026	112118	Shue, Rebecca	133144 Shue, Rebecca	512650879			\$805.00	Bill Payment
	5/22/2026	112119	USS Midway Museum	97190 USS Midway Museum	TEDU37037-1			\$740.00	Bill Payment
	5/22/2026	112120	Werner, Mathew	71986 Werner, Mathew	05/18/26 - Freeform Clay Reimbursement			\$50.00	Bill Payment
	5/22/2026	112121	West Coast Design & Consulting, Inc.	132602 West Coast Design & Consulting, Inc.	1308			\$8,913.00	Bill Payment
	5/22/2026	112122	Wilson, Jeremy	181096 Wilson, Jeremy	512650872			\$280.00	Bill Payment
	5/22/2026	112123	Woodward, Keri	224405 Woodward, Keri	January-May 2026			\$312.00	Bill Payment
	5/22/2026	112124	Yen, Wendy	209184 Yen, Wendy	512650880			\$2,016.00	Bill Payment
	5/27/2026	112125	Olmedo, Crystal	226781 Olmedo, Crystal	Final Check			\$725.40	Bill Payment
	5/29/2026	112126	1st Choice Backflow	21970 1st Choice Backflow	13137			\$130.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/29/2026	112127	5 Element Martial Arts & Wellness Center, LLC	129398 5 Element Martial Arts & Wellness Center, LLC	512651906			\$1,020.00	Bill Payment
	5/29/2026	112128	Allen, Andrew	140327 Allen, Andrew	512651915			\$1,800.00	Bill Payment
	5/29/2026	112129	Amazon Capital Services	177857 Amazon Capital Services	A1EJCAJXOWH87N			\$6,253.82	Bill Payment
	5/29/2026	112130	Arashi Brazilian Jiu-jitsu	194017 Arashi Brazilian Jiu-jitsu	512652854			\$750.00	Bill Payment
	5/29/2026	112131	AT&T - 9391084563	216673 AT&T - 9391084563	9391084563; Santee			\$32.42	Bill Payment
	5/29/2026	112132	AT&T - 9391084564	216670 AT&T - 9391084564	9391084564; Poway			\$32.42	Bill Payment
	5/29/2026	112133	AT&T - 9391084565	216672 AT&T - 9391084565	9391084565; Mary Lane			\$39.85	Bill Payment
	5/29/2026	112134	AT&T - 9391084566	216671 AT&T - 9391084566	9391084566; Poway			\$32.42	Bill Payment
	5/29/2026	112135	BBD Properties, LLC	76539 BBD Properties, LLC	June 2026			\$36,805.44	Bill Payment
	5/29/2026	112136	Beben, Whitney (P)	219151 Beben, Whitney (P)	May 2026			\$60.00	Bill Payment
	5/29/2026	112137	Beyond Vision Center Optometry	201064 Beyond Vision Center Optometry	05/15/26			\$180.00	Bill Payment
	5/29/2026	112138	BG Consolidated	21504 BG Consolidated	June 2026 - #143			\$19,904.20	Bill Payment
	5/29/2026	112139	Big Little Ones LLC	111823 Big Little Ones LLC	3864			\$34.95	Bill Payment
	5/29/2026	112140	Calming Bee	195103 Calming Bee	512651911			\$225.00	Bill Payment
	5/29/2026	112141	Caster Family Enterprises, Inc.	60588 Caster Family Enterprises, Inc.	June 2026			\$9,250.30	Bill Payment
	5/29/2026	112142	Caster Family Trust	60587 Caster Family Trust	June 2026			\$14,553.76	Bill Payment
	5/29/2026	112143	City of Escondido - Utility Billing	21840 City of Escondido - Utility Billing	03/24/26-04/27/26 - Mary Lane			\$476.24	Bill Payment
	5/29/2026	112144	Clark-Burnell, Lisa	154428 Clark-Burnell, Lisa	512651913			\$660.00	Bill Payment
	5/29/2026	112145	Cox Communications - Midway	222295 Cox Communications - Midway	001 3410 074203702			\$661.70	Bill Payment
	5/29/2026	112146	EDCO Waste & Recycling Service	70448 EDCO Waste & Recycling Service	05/31/26 - 25-5A 043413			\$285.65	Bill Payment
	5/29/2026	112147	Elliot, Tiffany	224149 Elliot, Tiffany	March 2026			\$315.00	Bill Payment
	5/29/2026	112148	Escondido Disposal Inc.	21568 Escondido Disposal Inc.	04/30/26 - 53-ED 184837			\$345.17	Bill Payment
	5/29/2026	112149	Firehawk Corporation	133573 Firehawk Corporation	E260515263			\$179.00	Bill Payment
	5/29/2026	112150	First Congregational Church of Escondido	21507 First Congregational Church of Escondido	June 2026			\$5,082.86	Bill Payment
	5/29/2026	112151	First Student	224837 First Student	FA26-00005570			\$2,758.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/29/2026	112152	Front Row Center Inc	196896 Front Row Center Inc	May 2026			\$5,828.23	Bill Payment
	5/29/2026	112153	Gatlin, Connie	214572 Gatlin, Connie	512652855			\$3,695.00	Bill Payment
	5/29/2026	112154	Gradisnean, Inc.	21506 Gradisnean, Inc.	June 2026			\$14,710.32	Bill Payment
	5/29/2026	112155	Hammersmith LLC	226176 Hammersmith LLC	512651919			\$450.00	Bill Payment
	5/29/2026	112156	Home Depot Credit Services	124241 Home Depot Credit Services	4/13/26-05/14/26			\$2,522.96	Bill Payment
	5/29/2026	112157	Indie Sol Enrichment	212264 Indie Sol Enrichment	512652856			\$225.00	Bill Payment
	5/29/2026	112158	JN Music Studio	211656 JN Music Studio	512651924			\$250.00	Bill Payment
	5/29/2026	112159	Kaiser Foundation Health Plan	98456 Kaiser Foundation Health Plan	06/01/26-06/30/26			\$88,847.96	Bill Payment
	5/29/2026	112160	LabRats San Diego	212265 LabRats San Diego	512652857			\$320.00	Bill Payment
	5/29/2026	112161	Lanterns Global LLC.	167839 Lanterns Global LLC.	512651925			\$3,838.00	Bill Payment
	5/29/2026	112162	Learning Journeys Forum, LLC	154427 Learning Journeys Forum, LLC	512651928			\$900.00	Bill Payment
	5/29/2026	112163	Leonard, Karin	24291 Leonard, Karin	512651931			\$515.00	Bill Payment
	5/29/2026	112164	Lloyd Pest Control	24272 Lloyd Pest Control	9261486			\$131.00	Bill Payment
	5/29/2026	112165	MacAller, Jennifer	200849 MacAller, Jennifer	March-May 2026 - Mandarin Chinese			\$484.00	Bill Payment
	5/29/2026	112166	Martinez, Amy Marie	92896 Martinez, Amy Marie	512651933			\$1,440.00	Bill Payment
	5/29/2026	112167	Matuszczak, Anna M.	176883 Matuszczak, Anna M.	512651909			\$980.00	Bill Payment
	5/29/2026	112168	Miller Music Academy	219851 Miller Music Academy	512651938			\$575.00	Bill Payment
	5/29/2026	112169	Montessori Services	24278 Montessori Services	SI266004983			\$322.45	Bill Payment
	5/29/2026	112170	Morrey, Cathrine	169917 Morrey, Cathrine	CM20260531			\$2,475.00	Bill Payment
	5/29/2026	112171	Nguyen, Charlotte (P)	226834 Nguyen, Charlotte (P)	January - May 2026			\$232.96	Bill Payment
	5/29/2026	112172	Noonan Family Swim School - San Diego	24570 Noonan Family Swim School - San Diego	512651945			\$924.00	Bill Payment
	5/29/2026	112173	Oak Meadow Inc.	22469 Oak Meadow Inc.	86566			\$625.96	Bill Payment
	5/29/2026	112174	Perpetual Motion Solutions, Inc.	144922 Perpetual Motion Solutions, Inc.	512652859			\$522.00	Bill Payment
	5/29/2026	112175	Peterson, Shannon	165747 Peterson, Shannon	512651940			\$495.00	Bill Payment
	5/29/2026	112176	Portal Languages - San Diego	223478 Portal Languages - San Diego	512651946			\$200.00	Bill Payment
	5/29/2026	112177	Robinson, Rachel	166334 Robinson, Rachel	512651935			\$850.00	Bill Payment

Account	Date	Check Number	Company Name	Vendor ID	Memo	Date Due	Billed	Paid	Type
	5/29/2026	112178	Rockin' L&D Equine Education Services	128816 Rockin' L&D Equine Education Services	512651948			\$555.00	Bill Payment
	5/29/2026	112179	San Diego Craft Collective	194023 San Diego Craft Collective	512651949			\$220.00	Bill Payment
	5/29/2026	112180	San Diego Gas & Electric- Carlsbad	74217 San Diego Gas & Electric- Carlsbad	8461 085 798 9			\$1,355.31	Bill Payment
	5/29/2026	112181	San Diego Junior Theatre	22128 San Diego Junior Theatre	512652860			\$1,225.00	Bill Payment
	5/29/2026	112182	Sasso, Danielle	208063 Sasso, Danielle	February-May 2026			\$63.00	Bill Payment
	5/29/2026	112183	School Food Solutions L3C	199882 School Food Solutions L3C	7992			\$2,400.00	Bill Payment
	5/29/2026	112184	Schools First Plan Admin LLC	164605 Schools First Plan Admin LLC	05/20/2026 403B			\$24,706.58	Bill Payment
	5/29/2026	112185	Science Mom	218711 Science Mom	2025136			\$325.00	Bill Payment
	5/29/2026	112186	Shue, Rebecca	133144 Shue, Rebecca	512651950			\$830.00	Bill Payment
	5/29/2026	112187	Smith, Ruth	108043 Smith, Ruth	512651942			\$450.00	Bill Payment
	5/29/2026	112188	SoCal Chess Academy LLC	195954 SoCal Chess Academy LLC	512651952			\$260.00	Bill Payment
	5/29/2026	112189	Sousa, Ryan	154324 Sousa, Ryan	4/24/26 - Catalina Trip Reimbursement			\$151.91	Bill Payment
	5/29/2026	112190	Taquizas Victor	82261 Taquizas Victor	34890			\$2,450.00	Bill Payment
	5/29/2026	112191	Tempest Freerunning Academy North County	106865 Tempest Freerunning Academy North County	512652861			\$1,320.00	Bill Payment
	5/29/2026	112192	U.S. Bank	21432 U.S. Bank	51526			\$20.15	Bill Payment
	5/29/2026	112193	UC Regents	226014 UC Regents	05212602			\$1,140.00	Bill Payment
	5/29/2026	112194	Villa Musica	195946 Villa Musica	73570-2411			\$877.50	Bill Payment
	5/29/2026	112195	Wess Transportation Services, Inc.	74282 Wess Transportation Services, Inc.	02-62738			\$1,179.90	Bill Payment
	5/29/2026	112196	Wilson, Jeremy	181096 Wilson, Jeremy	512651921			\$200.00	Bill Payment
	5/29/2026	112197	Xerox Corporation - D.O.	21570 Xerox Corporation - D.O.	42061599			\$1,985.21	Bill Payment
	5/29/2026	112198	Zensai US Inc	213649 Zensai US Inc	INV-0004547			\$21,271.00	Bill Payment
Total - Accounts Payable								\$0.00 \$619,940.79	
Total								\$0.00 \$619,940.79	

Coversheet

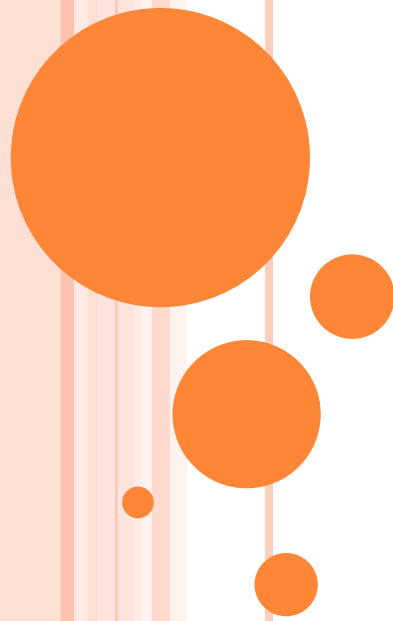
Financial Position of Schools

Section: VII. Information Item-Chief Business Officer Report
Item: A. Financial Position of Schools
Purpose: FYI
Submitted by: Doug Miller
Related Material: CM Board Presentation 06-26-26 (May) - FINAL.pdf
DCS Board Presentation 06-26-26 (May) - FINAL.pdf

BACKGROUND:

The Chief Business Officer provides a monthly report on the status of the organization's finances.

Enclosed are the CM and DCS financial reports for May 2026 for Board review.



June 26, 2026

COMMUNITY MONTESSORI

May 2026 Financials

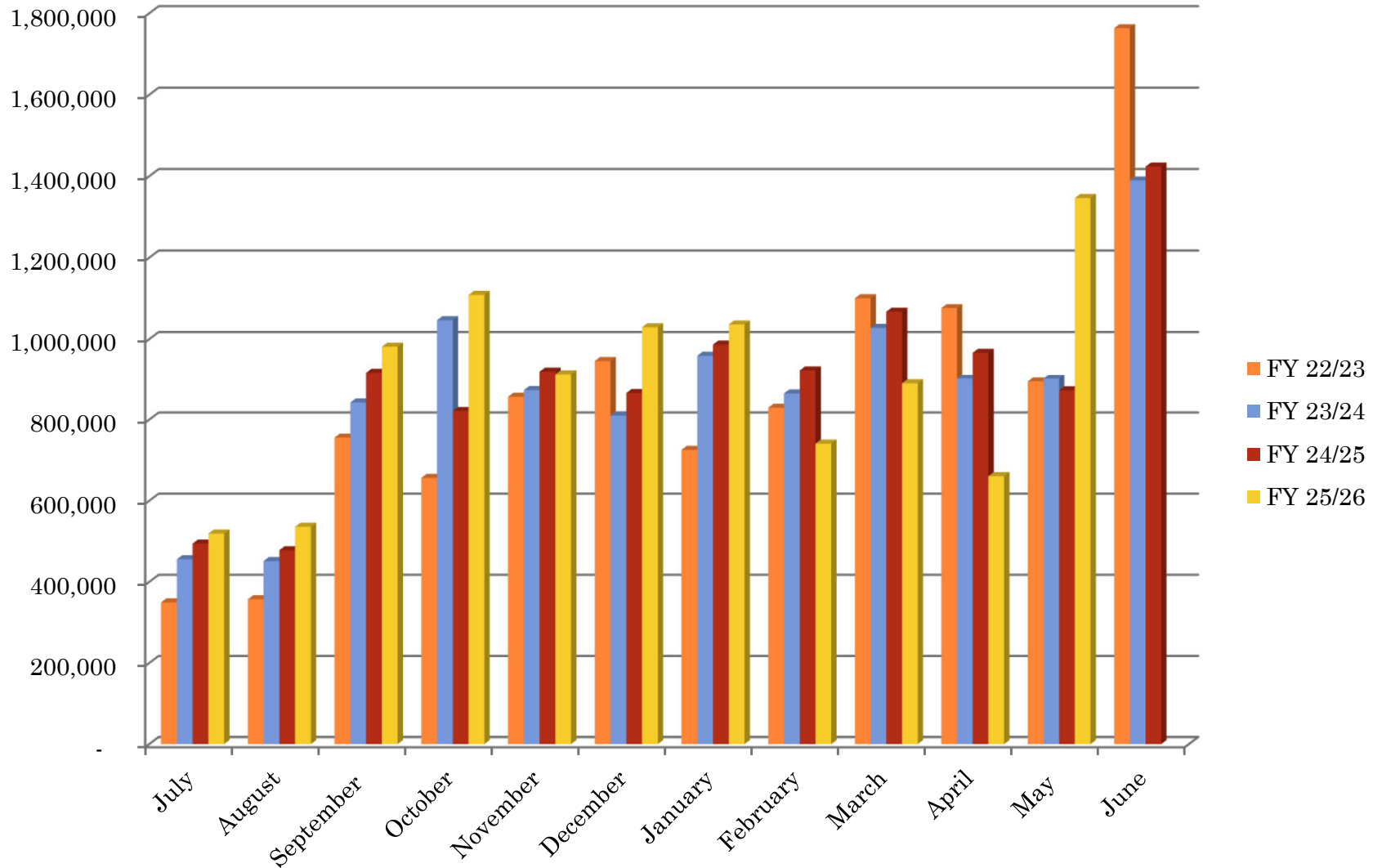
CONTENTS

- FY 25-26 May Financials

FY 25-26 FINANCIALS

- REVENUE
- Revenue was \$647,101 more than forecasted
 - \$541,698 – General Block Grant
 - In-Lieu of property tax revenue was higher than projected for the month
 - Carlsbad Unified's first half payment was received. Payment was due in March.
 - \$94,233 – Other State Income
 - Special education revenue was higher than projected for the month
 - Received April and May payments
 - State school nutrition revenue was higher than projected for the month
 - Two months payments were deposited
 - \$5,644 – Federal Income
 - Federal school nutrition revenue was higher than projected for the month
 - Two months of payments were deposited
 - \$3,459 – Local Income
 - Fundraising revenue was higher than projected for the month

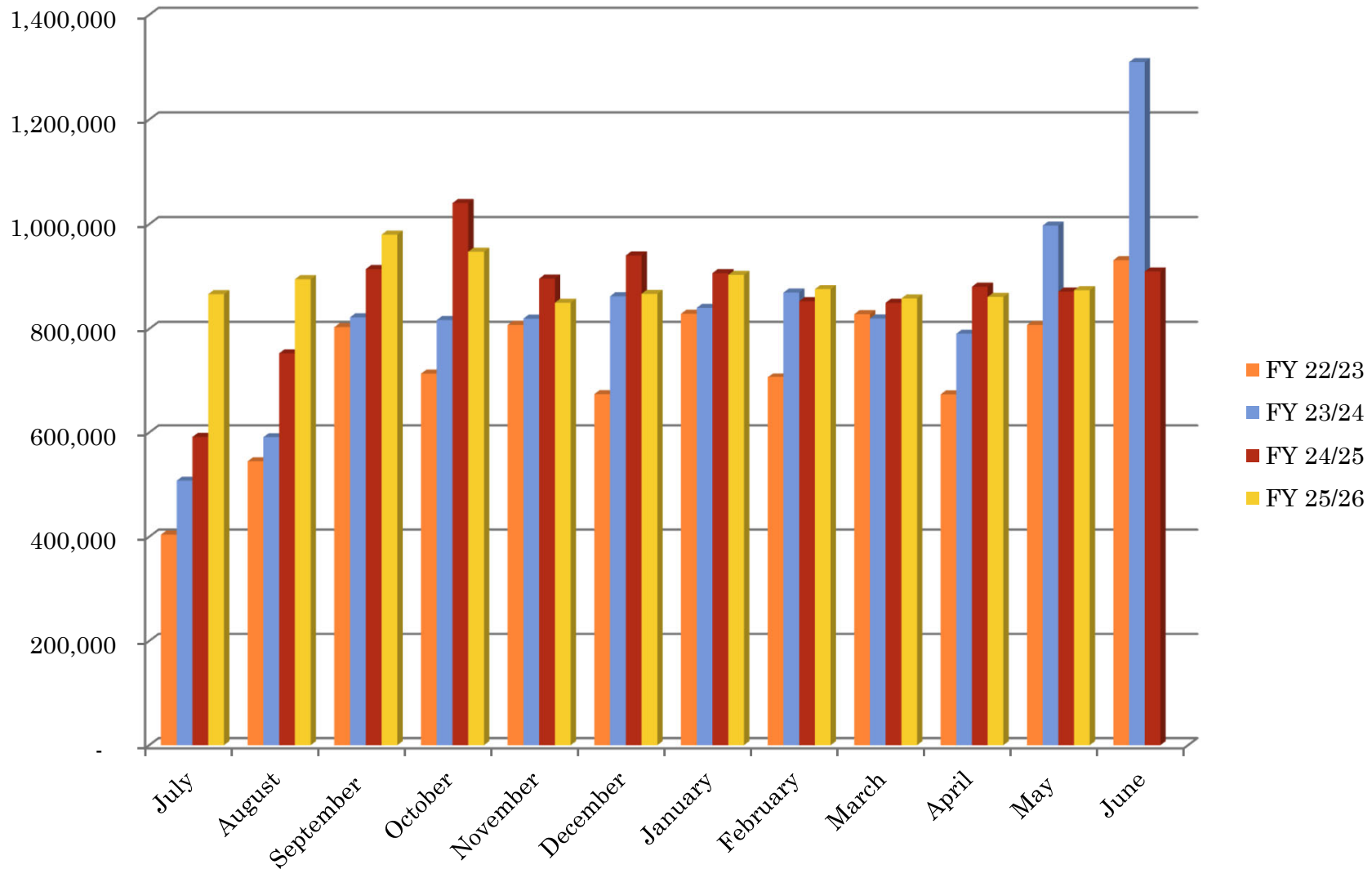
CM REVENUE YEAR OVER YEAR



FY 25-26 FINANCIALS

- EXPENSES
- Expenditures were **\$40,145** more than forecasted
 - \$1,349 – Certificated Employees
 - On budget
 - **\$22,954** – Classified Employees
 - Classified support salaries were higher than projected for the month
 - \$3,093 – Employee Benefits
 - On budget
 - **\$1,130** – Books and Supplies
 - Approved textbooks and core materials were higher than projected for the month
 - Year end buying of materials for next school year
 - **\$20,502** – Services and Other Operating Expenses
 - Travel and conference higher than projected for the month
 - Unanticipated travel to Sacramento
 - Professional and consulting fees higher than projected for the month
 - West Coast Design and City of Escondido for Oak Hill barn project
 - \$0 – Capital Expenditures
 - On budget

CM EXPENDITURES YEAR OVER YEAR



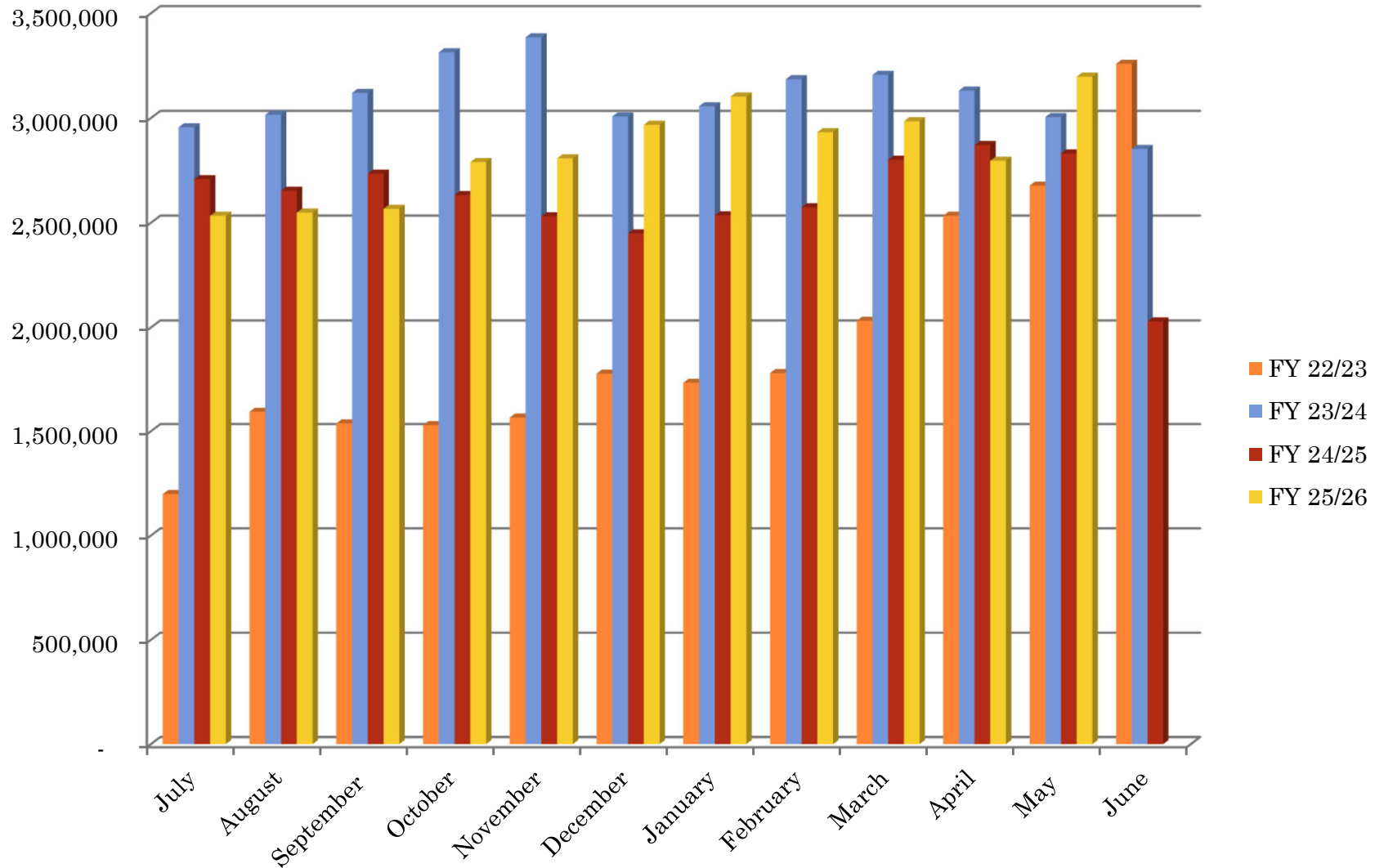
FISCAL YEAR FINANCIAL UPDATE

- **We are currently 92 percent through the fiscal year**
 - Certificated Salaries are at 93 percent of total budget
 - Classified Salaries are at 94 percent of total budget
 - Employee Benefits are at 94 percent of total budget
 - Books and Supplies are at 79 percent of total budget
 - Services and Other Operating Expenses are at 88 percent of total budget
 - Capital Expenditures are at 45 percent of budget
 - Total Expenses are at 89 percent of total budget

CASH FORECAST

- CM started off May 2026 with \$2,796,653 in cash
 - CM received \$401,217 more in cash than they spent in the month of May
 - CM ended the month of May 2026 with \$3,197,870 in cash
 - \$1,428,616 of which is reserved for economic uncertainties
 - \$1,000,000 of which is reserved future building purchases, replacements and or modernizations
 - \$769,254 of which has no designations. This represents undesignated cash reserves of 8% (4% or \$69,000 whichever is greater – minimum)

CM CASH YEAR OVER YEAR



Community Montessori As of May 31, 2026	May Actuals	May Budget	Variance	YTD Actuals	YTD Budget	Budget
REVENUE						
General Block Grant	1,148,473	606,775	541,698	8,198,509	7,656,811	9,556,019
Other State Income	175,459	81,226	94,233	1,248,016	1,137,617	1,325,854
Federal Income	13,102	5,390	7,712	46,140	43,819	170,320
Local Revenue	9,459	6,000	3,459	268,323	239,236	246,000
Total Revenue	\$ 1,346,492	\$ 699,391	\$ 647,101	\$ 9,760,988	\$ 9,077,483	\$ 11,298,193
EXPENSES						
Certificated Employees	344,374	345,723	1,349	3,505,733	3,509,443	3,775,376
Classified Employees	193,670	170,716	(22,954)	2,034,319	2,010,073	2,166,566
Employee Benefits	136,107	139,200	3,093	1,546,672	1,549,632	1,648,944
Books and Supplies	35,381	34,251	(1,130)	439,076	437,592	554,000
Services and Other Operating Expenses	164,441	143,939	(20,502)	2,020,219	1,991,437	2,300,960
Capital Outlay/Depreciation	-	-	-	232,455	232,455	512,445
Total Expenditure	\$ 873,974	\$ 833,829	\$ (40,145)	\$ 9,778,475	\$ 9,730,632	\$ 10,958,291
Total Other Financing Sources (Uses)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Excess (deficiency) of revenues and other financing sources over expenditures and other financing uses	\$ 472,519	\$ (134,438)	\$ 606,957	\$ (17,487)	\$ (653,149)	\$ 339,902
Fund Balance, Beginning of Period	\$ 5,726,785	\$ 5,698,079		\$ 6,216,790	\$ 6,216,790	\$ 6,216,790
Fund Balance, End of year	\$ 6,199,304	\$ 5,563,641		\$ 6,199,304	\$ 5,563,641	\$ 6,556,692

Community Montessori As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
REVENUE									
8012 - Education Protection Account	-	-	-	-	119,730	119,730	119,730	159,802	
8011 - Charter School General Purpose Aid	606,775		606,775		7,537,081	7,537,081	7,537,081	7,954,508	
8096 - In Lieu of Property Taxes	541,698		-		541,698	-	-	1,441,709	
8592 - Charter Schools Categorical Block Grant	-		-		-	-	-	-	
General Block Grant	\$ 1,148,473		\$ 606,775		\$ 8,198,509	\$ 7,656,811		\$ 9,556,019	
8297 - Prior Year Revenue not Accrued	-		-		-	-	-	-	
8310 - Implementation Grant	-		-		-	-	-	-	
8311 - Other State Apportionments	128,852		64,426		639,900	639,900	639,900	707,282	
8319 - Other State Apportionments - Prior Years	-		-		(14,744)	(3,676)	(3,676)	(3,676)	
8520 - State School Lunch	46,607		16,800		132,772	119,765	119,765	156,035	
8550 - Mandated Cost Reimbursement	-		-		16,097	16,097	16,097	16,097	
8560 - State Lottery Revenue	-		-		131,631	131,631	131,631	216,216	
8590 - All Other State Revenue	-		-		342,359	233,900	233,900	233,900	
Other State Income	\$ 175,459		\$ 81,226		\$ 1,248,016	\$ 1,137,617		\$ 1,325,854	
8182 - Special Education Reimbursement	-		-		9,673	9,673	9,673	127,963	
8220 - Federal School Lunch	13,102		5,390		36,467	34,146	34,146	42,357	
8297 - Prior Year Federal - Not Accrued	-		-		-	-	-	-	
8290 - Other Federal Revenue	-		-		-	-	-	-	
Federal Income	\$ 13,102		\$ 5,390		\$ 46,140	\$ 43,819		\$ 170,320	
8639 - Sales	87		-		136,205	115,000	115,000	115,000	
8650 - Leases and Rentals	-		-		-	-	-	-	
8660 - Interest	5,662		5,500		74,668	73,736	73,736	77,500	
8699 - All Other Local Revenue	-		-		-	-	-	-	
8701 - Student Fees	667		500		667	500	500	3,500	
8781 - All Other Transfers From Districts or Charter Schools	-		-		-	-	-	-	
8797 - All Other Financing Sources	-		-		-	-	-	-	
8803 - Fundraising	3,043		-		56,783	50,000	50,000	50,000	
8999 - Uncategorized Revenue	-		-		-	-	-	-	
Local Revenue	\$ 9,459		\$ 6,000		\$ 268,323	\$ 239,236		\$ 246,000	
Total Revenue	\$ 1,346,492		\$ 699,391		\$ 9,760,988	\$ 9,077,483		\$ 11,298,193	
EXPENSES									
1100 - Teachers Salaries	291,583		292,110		2,952,832	2,955,733	2,955,733	3,130,533	
1101 - Teacher Stipends	2,178		3,000		18,241	19,050	19,050	47,500	
1200 - Certified Pupil Support Salaries	5,974		5,974		59,419	59,419	59,419	67,773	
1300 - Certificated Supervisors and Administrators Salaries	44,639		44,639		475,242	475,241	475,241	529,570	
Certificated Employees	\$ 344,374		\$ 345,723		\$ 3,505,733	\$ 3,509,443		\$ 3,775,376	
2100 - Instructional Aide Salaries	76,503		77,057		738,590	737,979	737,979	771,073	
2101 -Club E Hourly	-		-		-	-	-	-	
2200 - Classified Support Salaries	29,961		6,901		342,245	319,297	319,297	319,297	
2201 -Club E Salary	-		-		-	-	-	-	
2300 - Classified Supervisors and Administrators Salaries	34,077		34,077		388,628	388,630	388,630	432,154	
2400 - Clerical, Technical and Office Staff Salaries	46,821		47,176		502,412	502,679	502,679	572,889	
2900 - Classified Other Salaries	-		-		-	-	-	-	
2930 - Maintenance and Grounds	6,309		5,505		62,444	61,488	61,488	71,153	
Classified Employees	\$ 193,670		\$ 170,716		\$ 2,034,319	\$ 2,010,073		\$ 2,166,566	
3101 - CalSTRS	65,193		65,914		661,641	662,804	662,804	721,097	
3202 - 403B/457/401A Employer Contribution	10,192		10,184		104,620	104,532	104,532	109,775	
3301 - OASDI/Medicare- Certificated Postions	4,839		4,873		49,552	49,580	49,580	54,750	
3302 - OASDI/Medicare- Classified Postions	14,234		14,956		147,646	148,497	148,497	157,738	
3401 - Health & Welfare Benefits, Certificated Positions	20,764		21,631		317,156	317,520	317,520	330,227	

Community Montessori As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
3402 - Health & Welfare Benefits, Classified Positions		17,178		17,494		215,799		216,063	222,982
3501 - SUI- Certificated Positions		36		-		5,877		5,842	7,961
3502 - SUI- Classified Postions		205		621		8,702		9,065	9,956
3601 - Workers Comp - Certificated		2,212		2,209		22,469		22,445	21,855
3602 - Workers Comp - Classified		1,254		1,318		13,210		13,284	12,603
Employee Benefits	\$	136,107	\$	139,200	\$	1,546,672	\$	1,549,632	\$ 1,648,944
4100 - Approved Textbooks and Core Curricula Materials		6,932		1,440		35,094		29,727	35,000
4205- Subscriptions		233		220		2,888		2,980	5,500
4300 - Materials and Supplies		-		-		-		-	-
4320 - Educational Software		-		-		51,624		51,625	65,000
4325 - Instructional Materials		3,757		3,601		35,830		34,637	65,000
4330 - Supplies		5,842		10,690		90,591		94,764	120,000
4352 - Staff Meetings		1,446		1,450		17,207		17,241	17,500
4353 - Testing Materials		89		508		6,137		6,664	20,000
4355 - EU Consumable		-		-		-		-	-
4360 - Marketing and Student Recruitment		-		-		-		-	1,000
4400 - Noncapitalized Expenditures		1,670		1,500		2,471		2,301	15,000
4420 - Computers		-		-		-		-	-
4423 - Instructional Technology		-		-		599		599	10,000
4433 - Administrative Technology		-		-		72,054		72,054	75,000
4700 - Food		15,413		14,842		124,581		125,000	125,000
Books and Supplies	\$	35,381	\$	34,251		439,076	\$	437,592	\$ 554,000
5103 - Learning Center Instructor		2,475		2,486		35,615		34,427	40,000
5104 - Shredding		82		108		941		964	1,200
5105 - Educational Units (EU's)		-		-		-		-	-
5115 - Tutoring Services (Non-EU)		-		-		-		-	-
5125 - Student Memberships		-		-		-		-	-
5200 - Travel and Conferences		2,817		-		23,673		20,000	20,000
5300 - Dues and Memberships		-		-		155		155	250
5305- Dues and Memberships Professional		-		491		22,782		23,284	25,000
5400 - Insurance		(1,391)		1,295		131,120		138,639	150,000
5500 - Operations and Housekeeping		-		1,591		3,368		4,991	15,000
5510 - Electricy		8,130		7,980		81,992		77,980	82,000
5515 - Janitorial Services/Gardening		5,256		1,859		34,961		30,000	30,000
5520 - Alarm Services		464		1,969		10,749		12,237	12,500
5525 - Trash		1,283		895		13,896		13,500	13,500
5530 - Water		2,373		2,215		28,807		27,413	30,000
5600 - Rentals, Leases and Repairs		-		-		-		-	-
5605 - Equipment Lease		1,233		2,245		9,017		9,864	15,000
5610 - Facility Leases		70,052		69,389		816,469		815,513	817,500
5615 - Repairs and Maintenance Building		2,535		2,550		33,941		33,668	37,500
5617 - Equipment Maintenance Contracts & License Fees		1,975		3,349		150,987		153,325	156,875
5618 - Repair & Maintenance - Auto		8		361		189		542	3,000
5800 - Professional/Consulting Services		22,007		8,662		170,538		156,391	160,000
5804 - Board Reimbursement		360		765		2,280		2,675	3,960
5805 - Administrative Fee		-		-		-		-	-
5808 - Property Tax		-		-		1,525		1,525	1,605
5809 - Banking Fees		105		105		1,282		1,268	1,500
5843 - Interest Expense		3,674		4,045		43,558		44,125	48,000
5824 - District Oversight Fees		-		-		-		-	95,560
5830 - Fieldtrips		10,282		10,000		160,664		161,292	200,410
5839 - Fundraising		1,740		1,500		7,673		7,433	12,500
5845 - Legal Fees		19,238		4,710		60,578		40,000	40,000
5851 - Marketing and Student Recruitment		106		1,045		1,408		2,346	10,500

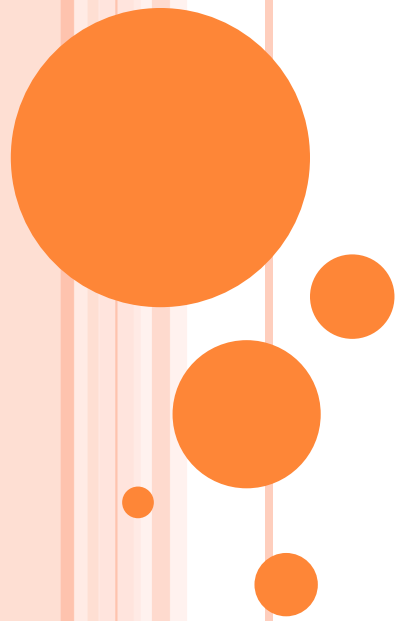
Community Montessori As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
5860 - Printing and Delivery		1,235		987		6,278		6,232	10,000
5863 - Professional Development		5,301		4,978		50,281		50,125	75,000
5869 - Special Education Services		-		1,500		65,471		67,691	105,100
5887 - IT Consultants		-		-		-		-	-
5905 - Cell Service		2,176		2,200		21,198		21,189	22,500
5910 - Internet		238		2,616		20,032		22,423	50,000
5915 - Postage		-		318		1,350		1,658	2,500
5920 - Telephone		687		1,725		7,441		8,562	12,500
Services and Other Operating Expenses	\$	164,441	\$	143,939	\$	2,020,219	\$	1,991,437	\$ 2,300,960
6000 - Capital Outlay		-		-		232,455		232,455	332,445
6900 - Depreciation		-		-		-		-	\$ 180,000
Capital Outlay	\$	-	\$	-	\$	232,455	\$	232,455	\$ 512,445
Total Expenditure	\$	873,974	\$	833,829	\$	9,778,475	\$	9,730,632	\$ 10,958,291
Total Other Financing Sources (Uses)	\$	-	\$	-	\$	-	\$	-	\$ -
Excess (deficiency) of revenues and other financing sources over expenditures and other financing uses	\$	472,519	\$	(134,438)	\$	(17,487)	\$	(653,149)	\$ 339,902
Fund Balance, Beginning of year	\$	5,726,785	\$	5,698,079	\$	6,216,790	\$	6,216,790	\$ 6,216,790
Fund Balance, End of Period	\$	6,199,304	\$	5,563,641	\$	6,199,304	\$	5,563,641	\$ 6,556,692

Community Montessori
As of May 31, 2026

	2025/2026 Actual & Forecast											
	Jul Actual	Aug Actual	Sep Actual	Oct Actual	Nov Actual	Dec Actual	Jan Actual	Feb Actual	Mar Actual	Apr Actual	May Actual	Jun Forecast
Beginning Cash	2,029,023	2,533,470	2,548,446	2,566,851	2,789,770	2,807,627	2,968,149	3,102,705	2,932,507	2,984,616	2,796,653	3,197,870
Revenue												
General Block Grant	464,543	464,543	875,403	836,179	836,179	875,402	836,179	606,775	648,058	606,775	1,148,473	1,535,962
Federal Income	-	-	-	-	7,048	15,173	-	6,452	4,366	-	13,102	132,316
Other State Income	34,700	62,647	62,672	232,130	62,897	83,500	189,720	96,039	211,505	36,746	175,459	203,555
Local Revenues	19,896	8,653	43,356	40,279	7,118	55,184	10,214	31,459	25,663	17,040	9,459	3,000
Total Revenue	519,139	535,844	981,431	1,108,589	913,243	1,029,259	1,036,114	740,724	889,592	660,561	1,346,492	1,874,833
Expenses												
Compensation & Benefits	209,199	650,854	759,185	705,961	656,948	696,146	692,631	652,271	696,236	693,144	674,151	587,684
Books & Supplies	126,322	36,431	23,788	69,036	29,544	26,528	19,407	22,046	21,232	29,360	35,381	23,524
Services & Other Operating Expenses	357,471	179,192	197,060	172,388	163,591	144,258	160,676	201,722	140,797	138,624	164,441	214,921
Capital Outlay	173,450	28,525	-	-	-	-	30,480	-	-	-	-	180,000
Total Expenses	866,441	895,002	980,033	947,385	850,083	866,932	903,194	876,039	858,264	861,128	873,974	1,006,129
Operating Cash Inflow (Outflow)	(347,302)	(359,159)	1,399	161,204	63,159	162,327	132,919	(135,315)	31,328	(200,567)	472,519	868,704
Accounts Receivable	1,066,906	127,933	-	69,926	-	-	-	-	-	-	-	-
Other Current Assets	182,030	-	-	-	-	-	-	-	-	-	(13,766)	-
Accounts Payable	(1,407)	444	(23)	14	(37)	(938)	930	(377)	(1,384)	32	(41)	-
Fixed Asset	-	-	-	-	-	-	-	-	-	-	-	-
Other Current Liabilities	(382,423)	259,027	30,346	5,272	(31,852)	12,720	14,216	(20,949)	36,146	26,226	(43,667)	-
Other Assets	-	-	-	-	-	-	-	-	-	-	-	-
Long Term Liabilities	(13,357)	(13,268)	(13,316)	(13,497)	(13,412)	(13,588)	(13,509)	(13,558)	(13,980)	(13,655)	(13,828)	(12,850)
Ending Cash	2,533,470	2,548,446	2,566,851	2,789,770	2,807,627	2,968,149	3,102,705	2,932,507	2,984,616	2,796,653	3,197,870	4,053,724

Cycle: FY2025-2026; Fund Class: <All>; Fund Columns: <All Funds>,62; Account Code
 Expression: ((Fund] = '62') ; Balance Date: 05/31/2026; Detail: No

Description	Total
9110-7638 - Cash In Treasury	\$ 1,993,928.65
9124-4000 - Cash In Bank - Wells Fargo Petty Cash	\$ 128.09
9124-4018 - Cash In Bank - Wells Fargo Operating	\$ 1,203,813.34
9126-3366 - Cash In Bank - US Bank	\$ -
9124-3994 - Cash In Bank - Wells Fargo Sweep	\$ -
9191 - Due to / from - Dehesa	\$ -
9219- AR Special Education (Fed)	\$ -
9226- AR Child Nutrition (Fed)	\$ -
9230- AR State Aid	\$ -
9232- AR Property Tax	\$ 10,845.00
9233- AR Lottery	\$ -
9239- Special Education	\$ -
9240- AR - State Aid	\$ -
9246- AR Special Education (State)	\$ -
9253- AR - ASAP	\$ -
9260- Miscellaneous	\$ -
9330 - Prepaid Expenditures	\$ 13,765.55
9340 - Other Current Assets	\$ -
9410 - Land	\$ 2,100,000.00
9420 - Improvement of Site	\$ 393,486.75
9425 - Accumulated Depreciation - Site	\$ (140,100.74)
9430 - Buildings	\$ 3,404,786.30
9436 - Accumulated Depreciation - Building Improvements	\$ (1,314,143.46)
9440 - Equipment	\$ 232,301.22
9445 - Accumulated Depreciation- Equipment	\$ (105,664.80)
9360 - Other Assets Deposits	\$ 35,758.02
9371 - Right of Use Asset Operating	\$ 4,517,739.00
9372 - Right of Use Asset Operating Accumulated Depreciation	\$ (1,596,628.00)
Subtotal of Account Group: Assets	\$ 10,750,014.92
9500 - Accounts Payable	\$ 14,172.85
9501- Accrued Accounts Payable	\$ -
9512- District PY Property Tax Adjustment	\$ -
9514 - AP Other	\$ -
9515 - AP Payroll Processing	\$ 1,948.55
9515 - Credit Card Summary	\$ (20,786.45)
9515 - CCSB-Ramp	\$ 33,640.17
9520 - Met Legal	\$ 1.44
9522 - Group Life Insurance	\$ (669.25)
9523 - Voluntary Benefits	\$ 1,854.16
9525 - FSA	\$ 2,432.24
9526 - Cobra	\$ -
9540 - Payroll Taxes Liability	\$ 50,362.69
9555 - STRS Liability	\$ 104,327.67
9570 - Wages Payable	\$ 189,436.63
9572 - Accrued PTO/Vacation	\$ 138,836.63
9580 - 403B	\$ 16,998.93
9585 - Training	\$ 5,440.70
9622 - Due to (From) DCS	\$ -
9640 - Current Loans (ASAP)	\$ -
9641 - Right of Use Operating Liability	\$ 3,027,882.00
9655 - Deferred Rent	\$ -
9669 - Wells Fargo Mortgage	\$ 1,009,571.85
APSB - AP Balancing	\$ (24,739.49)
Subtotal of Account Type: Liability	\$ 4,550,711.32
9760 - Fund Balance	\$ 6,216,790.44
Net Increase/Decrease	\$ (17,486.84)
Subtotal of Account Type: Fund Balance/Retained Earnings	\$ 6,199,303.60
Subtotal of Account Group: Liabilities/Fund Balance	\$ 10,750,014.92



June 26, 2026
**DIMENSIONS COLLABORATIVE
SCHOOL**
May 2026 Financials

CONTENTS

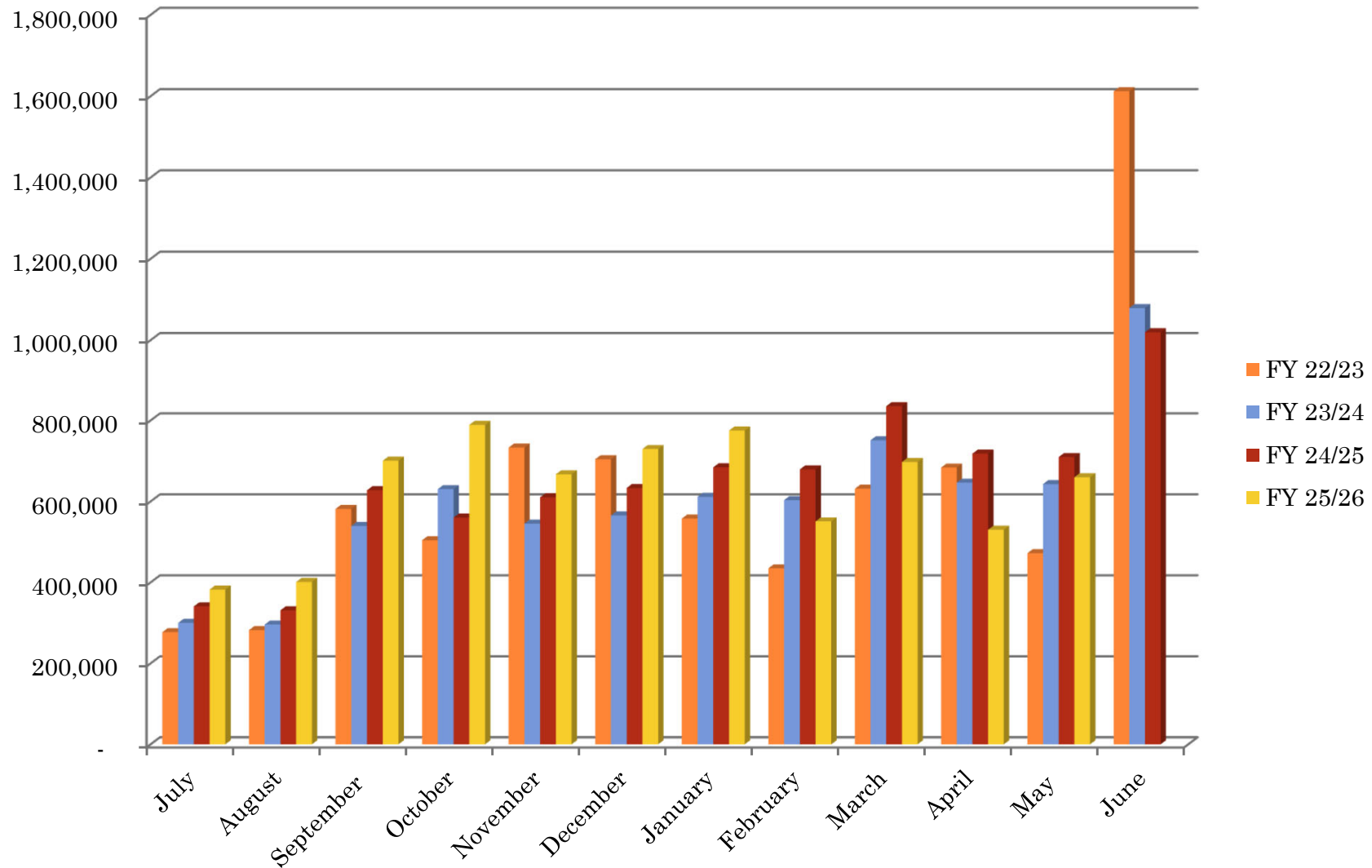
- FY 25-26 May Financials

FY 25-26 FINANCIALS

○ REVENUE

- Revenue received was \$130,225 more than was forecasted
 - \$63,626 – General Block Grant
 - In-Lieu of property tax revenue was higher than projected for the month
 - Carlsbad Unified's first half payment was received. Payment was due in March.
 - \$55,716 – Other State Income
 - Special education revenue was higher than projected for the month
 - Received April and May payments
 - State school nutrition revenue was higher than projected for the month
 - Two months payments were deposited
 - \$2,195 – Federal Income
 - Federal school nutrition revenue was higher than projected for the month
 - Two months of payments were deposited
 - \$8,688 – Local Income
 - Interest revenue was higher than projected for the month

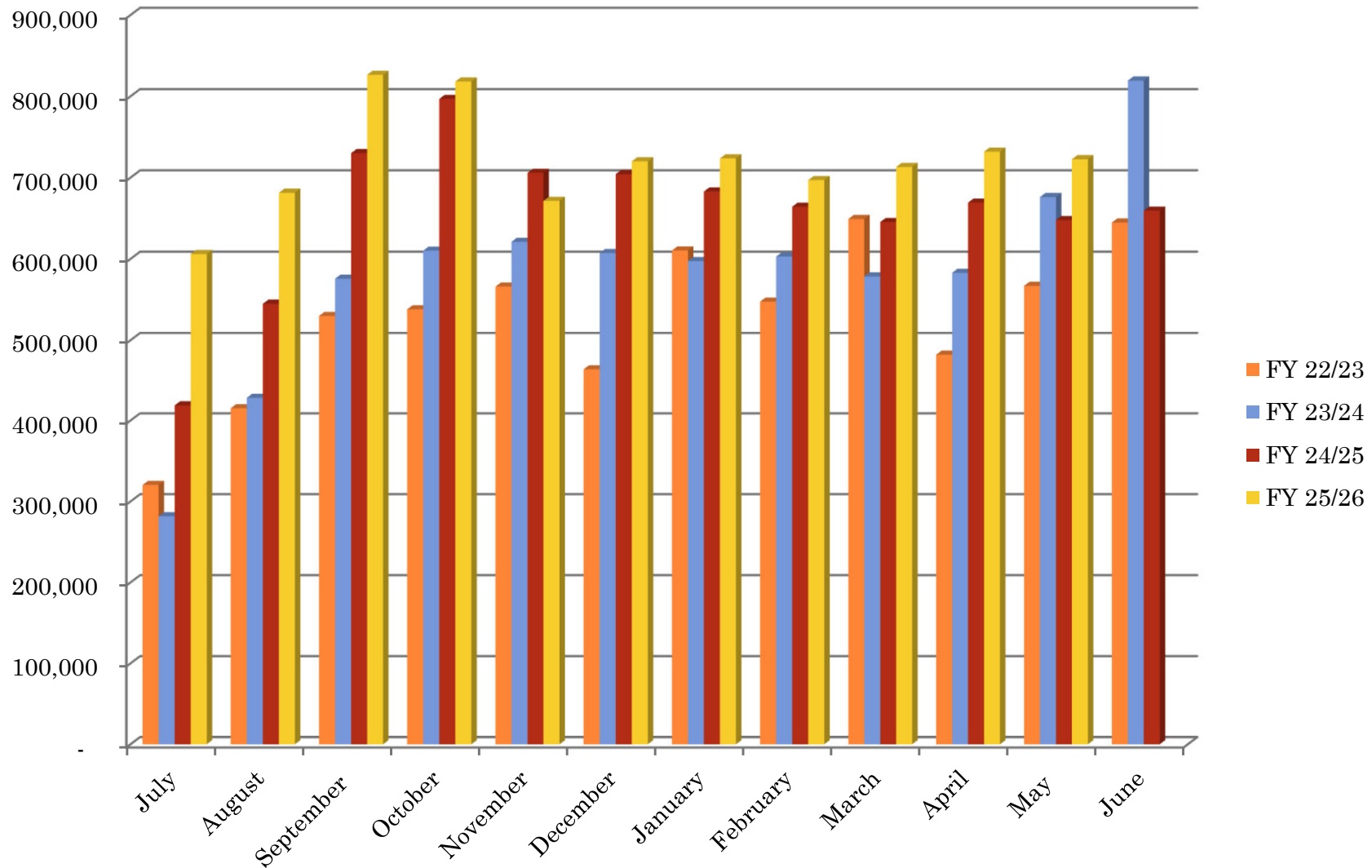
DCS REVENUE YEAR OVER YEAR



FY 25-26 FINANCIALS

- EXPENSES
- Expenditures were **\$105,114** more than forecasted
 - \$1,024 – Certificated Employees
 - On budget
 - **\$4,115** – Classified Employees
 - Instructional aid salaries were higher than projected
 - Hourly employees had more hours than projected
 - **\$391** – Employee Benefits
 - On budget
 - **\$1,395** – Books and Supplies
 - Approved textbook costs were higher than projected for the month
 - 28% increase over last years total cost
 - **\$100,238** – Services and Other Operating Expenses
 - EU's were higher than projected for the month
 - 8% higher than previous year with 5% less students
 - Professional consulting services higher than projected for the month/year
 - Consulting costs for Midway CUP higher than projected
 - Special education costs higher than projected for the month/year
 - Two NPS placements
 - Costs will be approximately 150% of what they were last year
 - \$0 – Capital Outlay
 - On budget

DCS EXPENDITURES YEAR OVER YEAR



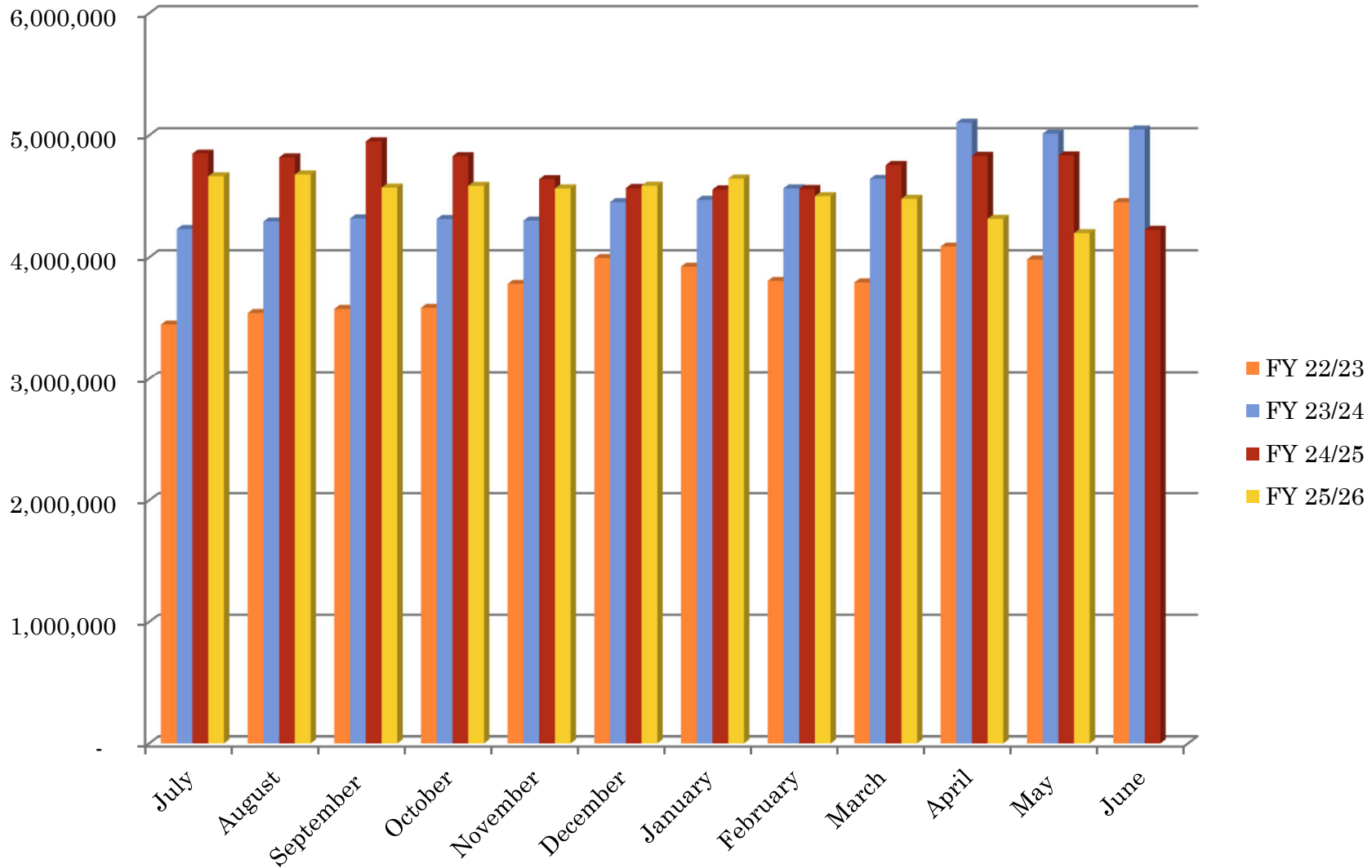
FISCAL YEAR FINANCIAL UPDATE

- **We are currently 92 percent through the fiscal year**
 - Certificated Salaries are at 95 percent of budget
 - Classified Salaries are at 102 percent of budget
 - Employee Benefits are at 94 percent of budget
 - Books and Supplies are at 92 percent of budget
 - Services and Other Operating expenses are at 100 percent of budget
 - Capital Outlay expenses are at 0 percent of budget
 - Total Expenses are at 95 percent of budget

CASH FORECAST

- DCS started off May 2026 with \$4,316,827 in cash
 - DCS spent **\$117,827** more in cash than they received in the month of May
 - DCS ended the month of May 2026 with \$4,199,000 in cash
 - \$1,429,350 of which is reserved for economic uncertainties
 - \$2,000,000 of which is reserved future building purchases, replacements and or modernizations
 - \$769,650 of which has no designations. This represents undesignated cash reserves of 9% (*4% or \$69,000 whichever is greater – minimum*)

DCS CASH YEAR OVER YEAR



Dimensions Collaborative School As of May 31, 2026	May Actuals	May Budget	Variance	YTD Actuals	YTD Budget	Budget
REVENUE						
General Block Grant	549,510	485,884	63,626	5,878,953	5,815,327	6,519,090
Other State Income	97,121	41,405	55,716	871,562	735,035	837,716
Federal Income	4,502	2,307	2,195	20,944	21,055	106,188
Local Revenue	8,738	50	8,688	111,511	92,675	92,625
Total Revenue	\$ 659,871	\$ 529,646	\$ 130,225	\$ 6,882,970	\$ 6,664,092	\$ 7,555,619
EXPENSES						
Certificated Employees	308,604	309,628	1,024	3,123,726	3,125,211	3,278,667
Classified Employees	91,767	87,652	(4,115)	1,033,551	1,029,393	1,018,150
Employee Benefits	114,716	114,325	(391)	1,259,686	1,258,496	1,337,268
Books and Supplies	20,614	19,219	(1,395)	685,014	672,913	743,000
Services and Other Operating Expenses	186,925	86,687	(100,238)	1,809,730	1,639,893	1,811,618
Capital Outlay/Depreciation	-	-	-	-	-	145,000
Other Outflows	-	-	-	-	-	-
Total Expenditure	\$ 722,625	\$ 617,511	\$ (105,114)	\$ 7,911,707	\$ 7,725,906	\$ 8,333,703
Total Other Financing Sources (Uses)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Excess (deficiency) of revenues and other financing sources over expenditures and other financing uses	\$ (62,754)	\$ (87,865)	\$ 25,111	\$ (1,028,737)	\$ (1,061,814)	\$ (778,084)
Fund Balance, Beginning of Period	\$ 4,067,303	\$ 4,059,337		\$ 5,033,286	\$ 5,033,286	\$ 4,923,660
Fund Balance, End of year	\$ 4,004,549	\$ 3,971,472		\$ 4,004,549	\$ 3,971,472	\$ 4,145,576

Dimensions Collaborative School As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
REVENUE									
8012 - Education Protection Account	-	-	-	-	77,767	77,767	77,767	77,767	103,794
8011 - Charter School General Purpose Aid	485,884	-	485,884	-	5,737,560	-	5,737,560	-	6,090,463
8096 - In Lieu of Property Taxes	63,626	-	-	-	63,626	-	-	-	324,833
8592 - Charter Schools Categorical Block Grant	-	-	-	-	-	-	-	-	-
General Block Grant	\$ 549,510	\$ -	\$ 485,884	\$ -	\$ 5,878,953	\$ -	\$ 5,815,327	\$ -	\$ 6,519,090
8019 - Prior Year Revenue not Accrued	-	-	-	-	-	-	-	-	-
8311 - Other State Apportionments	87,514	-	38,573	-	440,774	-	430,406	-	486,518
8319 - Other State Apportionments - Prior Years	-	-	-	-	(9,630)	-	(9,630)	-	(9,630)
8520 - State School Lunch	9,607	-	2,832	-	23,909	-	19,966	-	28,032
8550 - Mandated Cost Reimbursement	-	-	-	-	16,655	-	16,655	-	16,655
8560 - State Lottery Revenue	-	-	-	-	102,639	-	102,638	-	141,141
8590 - All Other State Revenue	-	-	-	-	297,215	-	175,000	-	175,000
Other State Income	\$ 97,121	\$ -	\$ 41,405	\$ -	\$ 871,562	\$ -	\$ 735,035	\$ -	\$ 837,716
8182 - Special Education Reimbursement	-	-	-	-	5,942	-	5,942	-	91,425
8220 - Federal School Lunch	4,502	-	2,307	-	11,778	-	11,889	-	14,763
8297 - Prior Year Federal - Not Accrued	-	-	-	-	-	-	-	-	-
8290 - Other Federal Revenue	-	-	-	-	3,224	-	3,224	-	-
Federal Income	\$ 4,502	\$ -	\$ 2,307	\$ -	\$ 20,944	\$ -	\$ 21,055	\$ -	\$ 106,188
8639 - Sales	334	-	50	-	3,342	-	1,550	-	1,500
8650 - Leases and Rentals	-	-	-	-	-	-	-	-	-
8660 - Interest	7,521	-	-	-	86,781	-	75,125	-	75,125
8699 - All Other Local Revenue	-	-	-	-	-	-	-	-	-
8701 - Student Fees	370	-	-	-	370	-	-	-	-
8781 - All Other Transfers from Districts or Charter Schools	-	-	-	-	-	-	-	-	-
8797 - All Other Financing Sources	-	-	-	-	-	-	-	-	-
8803 - Fundraising	513	-	-	-	20,118	-	16,000	-	16,000
8999 - Uncategorized Revenue	-	-	-	-	901	-	-	-	-
Local Revenue	\$ 8,738	\$ -	\$ 50	\$ -	\$ 111,511	\$ -	\$ 92,675	\$ -	\$ 92,625
Total Revenue	\$ 659,871	\$ -	\$ 529,646	\$ -	\$ 6,882,970	\$ -	\$ 6,664,092	\$ -	\$ 7,555,619
EXPENSES									
1100 - Teachers Salaries	256,920	-	260,453	-	2,585,077	-	2,589,070	-	2,702,977
1101 - Teacher Stipends	3,300	-	791	-	36,509	-	34,000	-	34,000
1200 - Certified Pupil Support Salaries	12,573	-	12,573	-	125,509	-	125,508	-	131,339
1300 - Certificated Supervisors and Administrators Salaries	35,811	-	35,811	-	376,631	-	376,633	-	410,351
Certificated Employees	\$ 308,604	\$ -	\$ 309,628	\$ -	\$ 3,123,726	\$ -	\$ 3,125,211	\$ -	\$ 3,278,667
2100 - Instructional Aide Salaries	17,686	-	12,346	-	164,229	-	159,021	-	159,021
2200 - Classified Support Salaries	12,247	-	12,250	-	192,995	-	192,949	-	194,298
2300 - Classified Supervisors and Administrators Salaries	23,680	-	23,545	-	270,064	-	269,925	-	269,925
2400 - Clerical, Technical and Office Staff Salaries	33,769	-	35,686	-	362,870	-	364,769	-	353,492
2900 - Classified Other Salaries	-	-	-	-	-	-	-	-	-
2930 - Maintenance and Grounds	4,385	-	3,825	-	43,394	-	42,729	-	41,414
Classified Employees	\$ 91,767	\$ -	\$ 87,652	\$ -	\$ 1,033,551	\$ -	\$ 1,029,393	\$ -	\$ 1,018,150
3101 - CalSTRS	58,258	-	58,933	-	586,939	-	587,702	-	626,225
3202 - 403B/457/401A Employer Contribution	5,956	-	5,911	-	61,345	-	61,238	-	64,290
3301 - OASDI/Medicare- Certificated Postions	4,264	-	4,331	-	43,764	-	43,793	-	48,360
3302 - OASDI/Medicare- Classified Postions	6,713	-	7,415	-	74,462	-	75,389	-	86,124
3401 - Health & Welfare Benefits, Certificated Positions	28,938	-	26,234	-	358,873	-	354,753	-	372,833
3402 - Health & Welfare Benefits, Classified Positions	8,011	-	8,714	-	99,103	-	100,197	-	100,958
3501 - SUI- Certificated Positions	-	-	-	-	4,809	-	4,809	-	6,452
3502 - SUI- Classified Postions	30	-	149	-	3,758	-	3,884	-	4,327
3503 - Employer Other - Certificated	-	-	-	-	-	-	-	-	-

Dimensions Collaborative School As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
3504 - Employer Other - Classified	-	-	-	-	-	-	-	-	-
3601 - Workers Comp - Certificated	1,949	1,980	19,888	19,905	20,026				
3602 - Workers Comp - Classified	596	658	6,745	6,826	7,673				
Employee Benefits	\$ 114,716	\$ 114,325	\$ 1,259,686	\$ 1,258,496	\$ 1,337,268				
4100 - Approved Textbooks and Core Curricula Materials	2,006	-	162,831	150,000	150,000				
4105 - Digital Text Books	-	-	-	-	-				
4205- Subscriptions	162	250	5,567	5,645	7,500				
4300 - Materials and Supplies	-	-	-	-	-				
4320 - Educational Software	2,540	2,500	96,443	96,392	110,000				
4325 - Instructional Materials	1,832	2,500	238,420	239,282	245,000				
4330 - Supplies	8,407	8,000	62,540	61,930	72,500				
4352 - Staff Meetings	1,005	1,000	13,013	12,973	15,000				
4353 - Testing Materials	62	438	6,853	7,241	12,500				
4355 - EU Consumable	-	-	-	-	-				
4360 - Marketing and Student Recruitment	456	500	6,831	7,089	10,500				
4400 - Noncapitalized Expenditures	-	-	1,731	1,731	5,000				
4420 - Computers	-	-	-	-	-				
4423 - Instructional Technology	-	-	3,619	3,619	15,000				
4433 - Administrative Technology	-	-	60,358	60,357	65,000				
4700 - Food	4,146	4,031	26,808	26,654	35,000				
Books and Supplies	\$ 20,614	\$ 19,219	685,014	\$ 672,913	\$ 743,000				
5103 - Resource Center Instructor	1,926	-	7,378	-	-				
5104 - Shredding	57	69	654	669	750				
5105 - Educational Units (EU's)	85,826	25,689	353,423	292,110	300,000				
5108 - Student Memberships	336	330	13,142	13,028	15,000				
5115 - Tutoring Services (Non-EU)	-	-	-	-	-				
5200 - Travel and Conferences	1,250	1,250	18,871	16,710	20,000				
5300 - Dues and Memberships	-	-	188	188	2,500				
5305 - Dues and Memberships Professional	-	-	18,831	18,854	20,000				
5400 - Insurance	(1,104)	1,616	88,246	95,219	101,312				
5500 - Operations and Housekeeping	-	-	1,050	1,050	5,000				
5510 - Electricity	3,193	3,298	34,059	34,026	40,000				
5515 - Janitorial & Gardening Services	295	255	3,528	3,209	5,900				
5520 - Alarm Services	106	225	2,900	2,602	3,500				
5525 - Trash	-	-	164	164	350				
5530 - Water	94	150	719	834	1,750				
5808 - Property Tax	-	-	-	-	-				
5600 - Rentals, Leases and Repairs	-	-	-	-	-				
5605 - Equipment Lease	753	1,000	5,558	5,915	10,000				
5610 - Facility Leases	46,356	46,705	549,217	548,160	550,000				
5615 - Repairs and Maintenance Building	-	-	12,741	12,945	17,500				
5617 - Equipment Maintenance Contracts & License Fees	374	500	153,497	153,726	155,975				
5618 - Repairs & Maintenance - Auto	6	25	159	178	2,500				
5800 - Professional/Consulting Services	16,689	-	157,961	120,000	120,000				
5804 - Board Reimbursement	360	400	2,280	2,410	3,960				
5805 - Management Fee	-	-	-	-	-				
5809 - Banking Fees	356	-	4,112	3,600	3,600				
5887 - ITConsultants	-	-	-	-	-				
5821 - Interest Expense	-	-	-	-	-				
5824 - District Oversight Fees	-	-	-	-	65,191				
5830 - Fieldtrips	829	1,000	36,316	35,238	60,000				
5839 - Fundraising	-	-	2,444	2,444	2,500				
5843 - Interest	-	-	-	-	100				
5845 - Legal Fees	710	725	24,226	24,305	27,500				
5851 - Marketing and Student Recruitment	3,913	-	47,052	30,900	30,900				
5860 - Printing and Delivery	18	25	4,228	4,127	5,500				

Dimensions Collaborative School As of May 31, 2026	May	Actuals	May	Budget	YTD	Actuals	YTD	Budget	Budget
5863 - Professional Development		488		500		13,088		13,063	20,000
5869 - Special Education Services		21,427		-		211,897		162,055	162,055
5905 - Cell Service		1,427		1,425		16,192		15,997	17,500
5910 - Internet		827		1,000		20,037		20,510	30,000
5915 - Postage		-		-		1,048		1,055	1,775
5920 - Telephone		414		500		4,522		4,602	9,000
Services and Other Operating Expenses	\$	186,925	\$	86,687	\$	1,809,730	\$	1,639,893	\$ 1,811,618
6000 - Capital Outlay		-		-		-		-	100,000
6900 - Depreciation		-		-		-		-	45,000
Capital Outlay	\$	-	\$	-	\$	-	\$	-	\$ 145,000
7000 - Other Outflows		-		-		-		-	-
Other Outflows	\$	-	\$	-	\$	-	\$	-	\$ -
Total Expenditure	\$	722,625	\$	617,511	\$	7,911,707	\$	7,725,906	\$ 8,333,703
Total Other Financing Sources (Uses)	\$	-	\$	-	\$	-	\$	-	\$ -
Excess (deficiency) of revenues and other financing sources over expenditures and other financing uses	\$	(62,754)	\$	(87,865)	\$	(1,028,737)	\$	(1,061,814)	\$ (778,084)
Fund Balance, Beginning of year	\$	4,067,303	\$	4,059,337	\$	5,033,286	\$	5,033,286	\$ 5,033,286
Fund Balance, End of Period	\$	4,004,549	\$	3,971,472	\$	4,004,549	\$	3,971,472	\$ 4,255,202

Dimensions Collaborative School
As of May 31, 2026

	2025/26 Actual & Forecast											
	Jul Actual	Aug Actual	Sep Actual	Oct Actual	Nov Actual	Dec Actual	Jan Actual	Feb Actual	Mar Actual	Apr Actual	May Actual	Jun Forecast
Beginning Cash	4,225,939	4,665,244	4,679,235	4,571,485	4,586,872	4,564,836	4,587,202	4,645,330	4,501,920	4,480,262	4,316,827	4,199,000
Revenue												
General Block Grant	344,912	344,912	648,327	620,840	620,840	648,326	620,840	485,884	508,678	485,884	549,510	776,832
Federal Income	-	-	-	-	2,229	7,821	-	2,159	4,232	-	4,502	60,190
Other State Income	24,120	47,044	43,564	163,017	42,769	47,214	142,614	52,215	181,742	30,142	97,121	90,977
Local Revenues	13,379	9,234	8,715	5,310	1,283	26,177	11,560	10,429	2,604	14,083	8,738	-
Total Revenue	382,411	401,190	700,606	789,167	667,122	729,537	775,014	550,686	697,256	530,109	659,871	927,999
Expenses												
Compensation & Benefits	171,992	488,910	575,462	531,941	502,135	527,315	529,615	519,487	527,224	527,795	515,086	471,022
Books & Supplies	115,220	83,476	116,899	140,382	32,228	21,936	46,310	36,619	35,260	36,070	20,614	32,920
Services & Other Operating Expenses	318,747	108,986	134,127	145,888	137,082	170,771	147,736	140,768	150,657	168,043	186,925	104,613
Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	45,000
Other Outflows	-	-	-	-	-	-	-	-	-	-	-	-
Total Expenses	605,959	681,372	826,487	818,212	671,446	720,022	723,661	696,874	713,140	731,908	722,625	653,555
Operating Cash Inflow (Outflow)	(223,548)	(280,182)	(125,882)	(29,044)	(4,323)	9,515	51,353	(146,188)	(15,884)	(201,799)	(62,754)	274,444
Accounts Receivable	809,573	80,894	-	40,711	-	-	-	-	-	-	-	-
Other Current Assets	167,258	-	-	-	-	-	-	-	-	-	(5,155)	-
Accounts Payable	(3,613)	1,052	(2,751)	(4,516)	20	36	635	(308)	(519)	(92)	(883)	-
Other Current Liabilities	(310,365)	212,227	20,883	8,236	(17,733)	12,815	6,139	3,086	(5,255)	38,457	(49,034)	-
Fixed Assets	-	-	-	-	-	-	-	-	-	-	-	-
Long Term Liabilities	-	-	-	-	-	-	-	-	-	-	-	-
Other Assets	-	-	-	-	-	-	-	-	-	-	-	-
Ending Cash	4,665,244	4,679,235	4,571,485	4,586,872	4,564,836	4,587,202	4,645,329.89	4,501,920	4,480,262	4,316,827	4,199,000	4,473,444

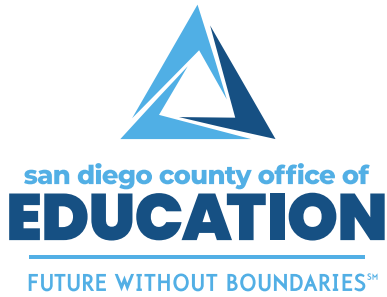
Cycle: FY2025-2026; Fund Class: <All>; Fund Columns: <All Funds>,62; Account Code
 Expression: ([Fund] = '62'); Balance Date: 05/31/2026; Detail: No

Description	Total
9110-7639 - Cash In Treasury	\$ 2,730,601.94
9124-4000 - Cash In Bank - Wells Fargo Petty Cash	\$ 2,554.73
9126-3366 - Cash In Bank - US Bank	\$ -
9124-3994 - Cash in Bank - Wells Fargo Sweep	\$ 1,595,812.97
9124-4018 - Cash in Bank - Wells Fargo Operating	\$ (12,142.75)
9191 - Due to / from - Community Montessori	\$ -
9210- AR PCSGP Grant	\$ -
9219- AR Special Education (Fed)	\$ -
9226- AR Child Nutrition (Fed)	\$ -
9230- AR State Aid	\$ -
9232- AR Property Tax	\$ -
9233- AR Lottery	\$ -
9239- AR Special Education	\$ -
9246- AR Child Nutrition (State)	\$ -
9253- AR ASAP	\$ -
9260- AR Misc	\$ -
9312 - Due from CM	\$ -
9330- Prepaid Expenditures	\$ -
9340- Due from US Bank	\$ -
9420 - Land Improvement	\$ 38,879.18
9425 - Accumulated Depreciation - Land Improvements	\$ (5,950.86)
9430 - Buildings	\$ 369,786.16
9436 - Accumulated Depreciation - Buildings	\$ (300,718.88)
9440 - Equipment	\$ 517,782.62
9445 - Accumulated Depreciation- Equipment	\$ (443,583.52)
9360 - Other Assets Deposits	\$ 96,961.73
9371 - Right of Use Asset Operating	\$ 2,632,079.00
9372 - Right of Use Asset Operating Accumulated Amortization	\$ (1,358,845.00)
Subtotal of Account Group: Assets	\$ 5,863,217.32
9500 - Accounts Payable	\$ 125,327.03
9501- Accrued Accounts Payable	\$ -
9514 - AP Other	\$ -
9515 - AP Payroll Processing Fee	\$ 1,463.14
9515 - Ramp EEI	\$ (14,427.81)
9515 - CCSB-Ramp	\$ 20,312.42
9520 - Met Legal	\$ 43.88
9522 - Group Life Insurance	\$ 270.99
9523 - Voluntary Benefits	\$ 779.66
9525 - FSA	\$ 2,968.45
9540 - Payroll Taxes Liability	\$ 37,350.50
9555 - STRS Liability	\$ 94,436.04
9570 - Wages Payable	\$ 144,882.30
9572 - Accrued PTO/Vacation	\$ 105,696.34
9580 - 403B	\$ (2,585.07)
9585 - Training	\$ (797.36)
9640 - Current Loans (ASAP)	\$ -
9641 - Right of Use Operating Liability	\$ 1,359,841.00
9650 - Deferred Revenue	\$ -
9655 - Deferred Rent	\$ -
9669 - Other General Long Term Debt	\$ -
APSB - AP Balancing	\$ (80,897.24)
Subtotal of Account Type: Liability	\$ 1,794,664.27
9760 - Fund Balance, unreserved	\$ 5,033,285.83
Net Increase/Decrease	\$ (964,732.78)
Subtotal of Account Type: Fund Balance/Retained Earnings	\$ 4,068,553.05
Subtotal of Account Group: Liabilities/Fund Balance	\$ 5,863,217.32

Coversheet

Authorizer Relations

Section: X. Executive Director Report
Item: A. Authorizer Relations
Purpose: FYI
Submitted by:
Related Material: 2526_FIN_I2_DCS_LETTER.pdf
2526_FIN_I2_CM_LETTER.pdf



San Diego County Office of Education Main Campus
6401 Linda Vista Road, San Diego, CA 92111
858-292-3500 | www.sdcoe.net

June 18, 2026

Dimensions Collaborative School
Terri Novacek, Executive Director
1441 Montiel Rd. Suite 143
Escondido, CA 92026

Dear Ms. Novacek,

Re: 2025-26 Second Interim Report

Our office has completed its review of Dimensions Collaborative School's second interim report in compliance with the provisions of California Education Code Section 47604.33 et seq. The charter school's second interim report has been analyzed in the context of the 2025-26 State Budget Act and the 2026-27 Governor's Proposed Budget.

In accordance with the provisions of Education Code Section 47604.33, as the chartering authority of the charter school, the San Diego County Office of Education (SDCOE) has assessed the fiscal condition of Dimensions Collaborative School and believes the charter school will meet all its financial obligations for the current and two subsequent fiscal years based on the financial reporting and analysis at this time.

Financial Status in 2025-26

Attendance and Enrollment

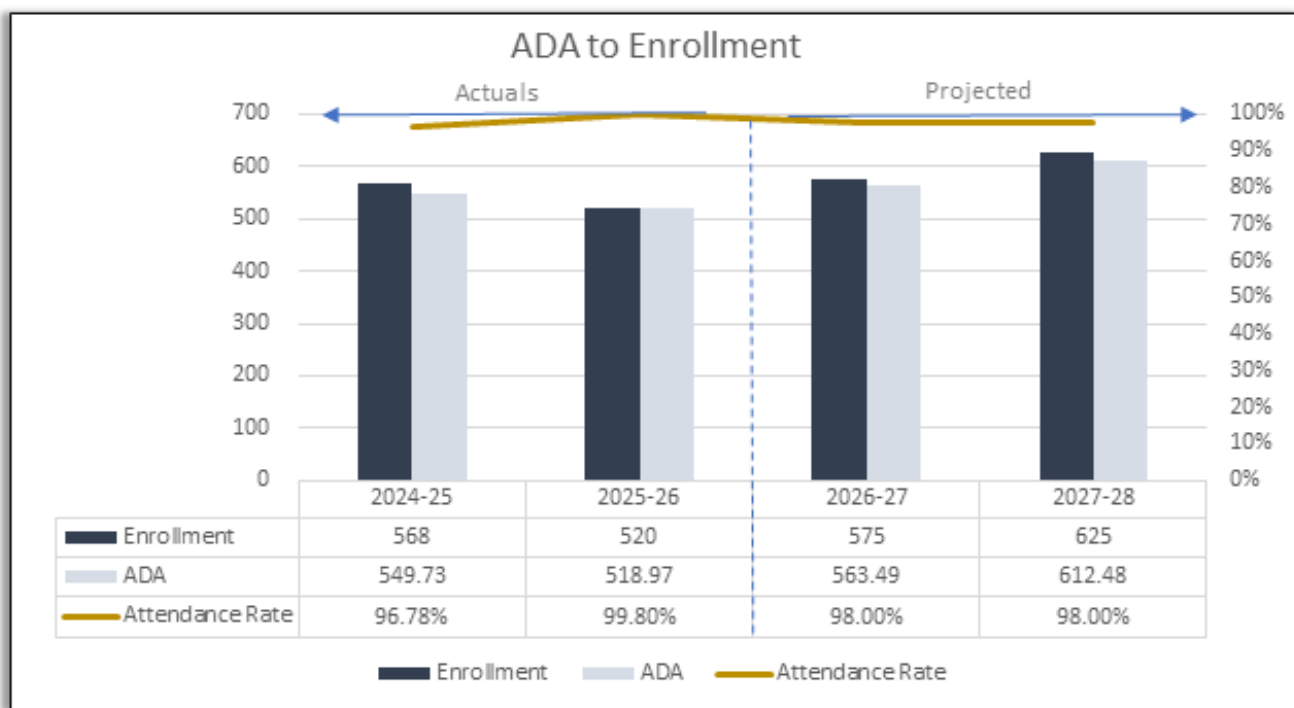
Dimensions Collaborative School's projected enrollment submitted with the 2025-26 second interim report is consistent with the 2025-26 California Longitudinal Pupil Achievement Data System (CALPADS) Fall I am reporting period of 520 students. Over the next two years, enrollment is projected to increase to 575 and 625 respectively.

Following the second interim reporting period, the charter school submitted its Second Principal Apportionment (P-2) attendance report to SDCOE and the California Department of Education (CDE). The P-2 report reflects 2025-26 average daily attendance (ADA) of 523.89, which is slightly higher than the estimated ADA of 518.97 included in the second interim report. Based on CALPADS Fall 1 enrollment and reported P-2 ADA, the charter school's 2025-26 attendance rate is 100%.

2025-26 Second Interim Report
 Dimensions Collaborative School
 June 18, 2026
 Page 2 of 6

The charter school experiences consistent attendance rates year over year, ranging from 96.78% to 101.20%. While the ADA is at 100%, it is attributable to the charter school's nonclassroom-based instructional model and year-round enrollment practices. Enrollment reported through CALPADS reflects only those students enrolled as of the first Wednesday in October, whereas ADA includes all students who generate attendance during the fiscal year. Students continuously enroll throughout the year; therefore, students who enroll after the Fall 1 census date contribute to ADA but are not reflected in the CALPADS enrollment count.

Historical enrollment and attendance figures, as well as the assumptions included in the charter school's multiyear projection, are presented in the following chart.



Deficit Spending / Ending Fund Balance / Reserve for Economic Uncertainties

The 2025-26 second interim budget report projects the following impacts to the unrestricted general fund:

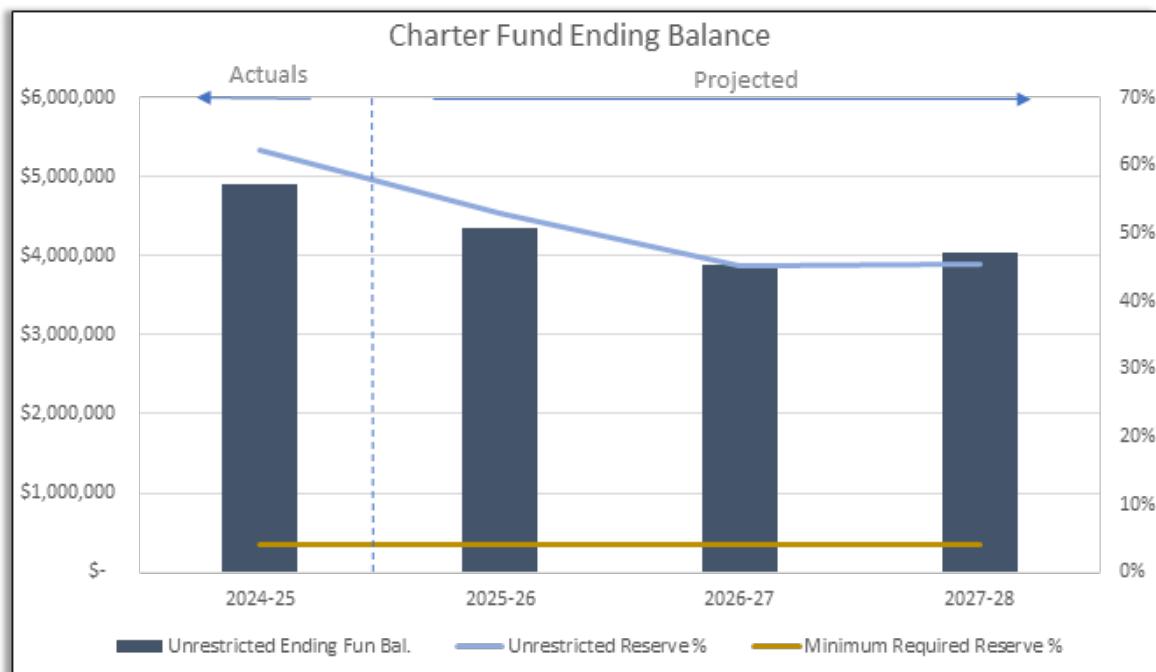
2025-26 Second Interim Report
 Dimensions Collaborative School
 June 18, 2026
 Page 3 of 6

Fiscal Year	Unrestricted Surplus/(Deficit)	Unrestricted Ending Fund Balance	Reserve for Economic Uncertainties (Ending Fund Balance/Total Expenditures)
2025-26	(\$546,307)	\$4.35 million	52.88%
2026-27	(\$468,543)	\$3.89 million	45.25%
2027-28	\$144,486	\$4.03 million	45.52%

The San Diego County Office of Education requires the charter school to maintain a reserve for economic uncertainties (REU) equal to 4% of expenditures. The charter school projects that it will meet this requirement in 2025-26 and beyond.

While the charter school maintains sufficient reserves to absorb the projected unrestricted deficits in 2025-26 and 2026-27, the projected improvement in operating results is dependent upon achieving the enrollment and ADA assumptions included in the multiyear projection. Enrollment trends should be monitored closely given the projected growth’s impact on funding over the projection period.

The following chart displays the charter school’s ending unrestricted fund balance and REU from fiscal year 2024-25 through the projection period.



2025-26 Second Interim Report
 Dimensions Collaborative School
 June 18, 2026
 Page 4 of 6

Multiyear Projection

The chart below shows the assumptions used in the charter school's multiyear projection (MYP).

Assumption	2025-26	2026-27	2027-28
Cost-of-Living Adjustment (COLA)	2.30%	3.02%	3.42%
CalSTRS	19.10%	19.10%	19.10%
Salary Step and Column	3%	3%	3%
Contributions to Restricted Programs	\$521,000	\$800,000	\$800,000

The charter school's multiyear projection shows deficit spending in the unrestricted general fund of \$546,307 in 2025-26, \$468,543 in 2026-27, followed by a surplus of \$144,486 in 2027-28. The projected surplus in the third year is largely attributable to projected increases in ADA-driven revenues, while expenditure growth remains relatively flat over the projection period.

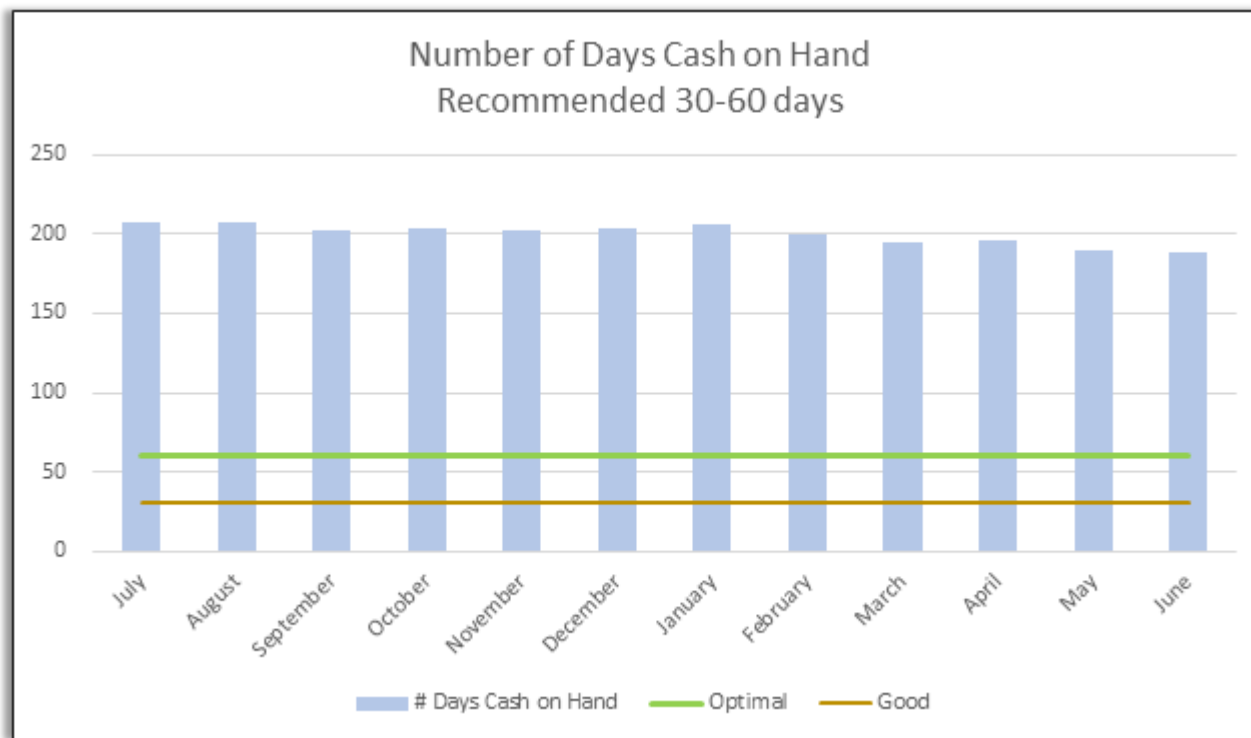
The charter school maintains adequate reserves to fund the deficits and estimates that it will be able to meet the 4% reserve requirement over the projection period. However, given the projected deficit spending in the first two years, the charter school should continue to closely monitor enrollment, revenues, and expenditures to ensure long-term fiscal stability.

In our review, the following was noted:

- Revenues have been adjusted to reflect the expiration of one-time funds in the two subsequent fiscal years; however, it is unclear whether corresponding expenditure reductions have been incorporated into the multiyear projection.
- Personnel salaries are projected to increase by 3% in each of the subsequent fiscal years. The charter school has indicated that it previously increased staffing, and the current level is expected to accommodate the projected enrollment growth.
- Non-personnel expenditures in 2025-26 have been adjusted based on current costs and student needs. Subsequent year projections have been increased in alignment with historical spending patterns and projected inflation.

Cash Flow

The charter school industry recommends that charter schools maintain a cash balance between 30 and 60 days of cash on hand. The cash flow submitted with the 2025-26 second interim budget report projects a positive cash balance in all months. Cash on hand for Dimensions Collaborative School is projected to range from 188 to 207 days.



The submitted cash flow does not reflect the impact of the state’s June principal apportionment deferral (EC 14041.6(k)). As part of our review, SDCOE analyzed the cash flow incorporating the effect of the June 2026 deferral. Under this adjusted scenario, the projected cash balance remains positive; however, it would decrease from the reported level of \$4.2 million to approximately \$3.7 million, and from 188 to 167 days of cash on hand.

Long-Term Debt and Liabilities

Dimensions Collaborative School does not currently have any long-term liabilities.

Conclusion

Dimensions Collaborative School’s second interim report reflects positive financial indicators, including strong reserve levels, positive cash flow, and projected growth in enrollment and ADA.

The charter school’s multiyear projection indicates unrestricted operating deficits in 2025-26 and 2026-27, followed by a surplus in 2027-28. The projected improvement in operating results is largely attributable to increases in ADA-driven revenues associated with projected enrollment growth, while expenditure growth is projected to remain relatively modest at approximately 3% annually throughout the projection period.

2025-26 Second Interim Report
Dimensions Collaborative School
June 18, 2026
Page 6 of 6

While the charter school maintains sufficient reserves to absorb the projected deficits and is expected to exceed the required reserve for economic uncertainties throughout the projection period, the projected unrestricted surplus in 2027-28 is dependent upon achieving the enrollment and ADA growth assumptions included in the multiyear projection. Given the charter school's strong reserve position and history of prudent fiscal management, it appears well positioned to monitor these assumptions and make adjustments as necessary to maintain long-term fiscal stability.

We appreciate Dimensions Collaborative School's efforts to ensure fiscal solvency. Should any adverse circumstances arise, that would negatively impact the financial condition of the charter school, please notify our office as soon as possible.

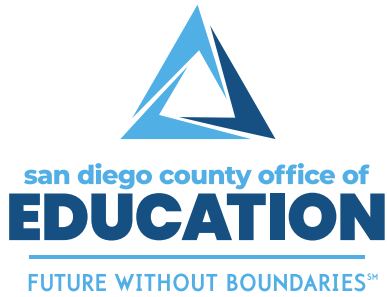
If you have any questions concerning this review, please feel free to contact Anna Buxbaum at abuxbaum@sdcoe.net, or at 858-290-5899.

Sincerely,



Kristin Armatis
Executive Director, Charter School Services

cc: Chris Nunley, Board President, Element Education
Doug Miller, Chief Business Official, Element Education
Melanie Baier, Coordinator, Charter School Services, SDCOE



San Diego County Office of Education Main Campus
6401 Linda Vista Road, San Diego, CA 92111
858-292-3500 | www.sdcoe.net

June 18, 2026

Community Montessori
Terri Novacek, Executive Director
1441 Montiel Rd. Suite 143
Escondido, CA 92026

Dear Ms. Novacek:

Re: 2025-26 Second Interim Report

Our office has completed its review of Community Montessori's second interim report in compliance with the provisions of California Education Code Section 47604.33 et seq. The charter school's second interim report has been analyzed in the context of the 2025-26 State Budget Act and the 2026-27 Governor's Proposed Budget.

In accordance with the provisions of Education Code Section 47604.33, as the chartering authority of the charter school, the San Diego County Office of Education (SDCOE) has assessed the fiscal condition of Community Montessori and believes the charter school will meet all its financial obligations for the current and two subsequent fiscal years based on the financial reporting and analysis at this time.

Financial Status in 2025-26

Attendance and Enrollment

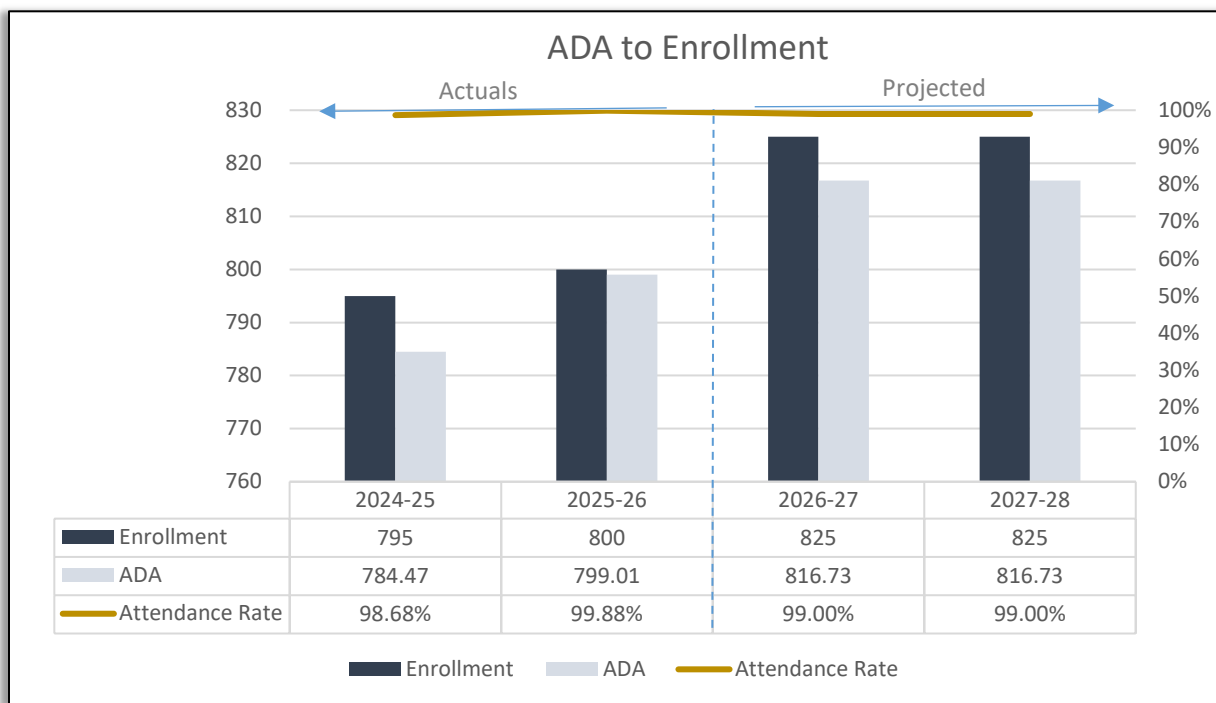
Community Montessori's enrollment projections submitted with the 2025-26 second interim report were consistent with the 2025-26 California Longitudinal Pupil Achievement Data System (CALPADS) Fall I reporting period of 800 students. Enrollment is projected to increase to 825 students in each of the two subsequent years.

Following the second interim reporting period, the charter school submitted its Second Principal Apportionment (P-2) attendance report to SDCOE and the California Department of Education (CDE). The P-2 report reflects 2025-26 average daily attendance (ADA) of 797.75, which is consistent with the estimated ADA of 799.01 included in the second interim report. Based on CALPADS Fall 1 enrollment and reported P-2 ADA, the charter school's 2025–26 attendance

2025-26 Second Interim Report
 Community Montessori
 June 18, 2026
 Page 2 of 5

rate is 99.88%. Overall, projected enrollment and ADA assumptions in the multiyear projection appear reasonable based on current reporting and historical trends.

Historical enrollment and attendance figures, as well as the assumptions included in the charter school’s multiyear projection, are presented in the following chart:



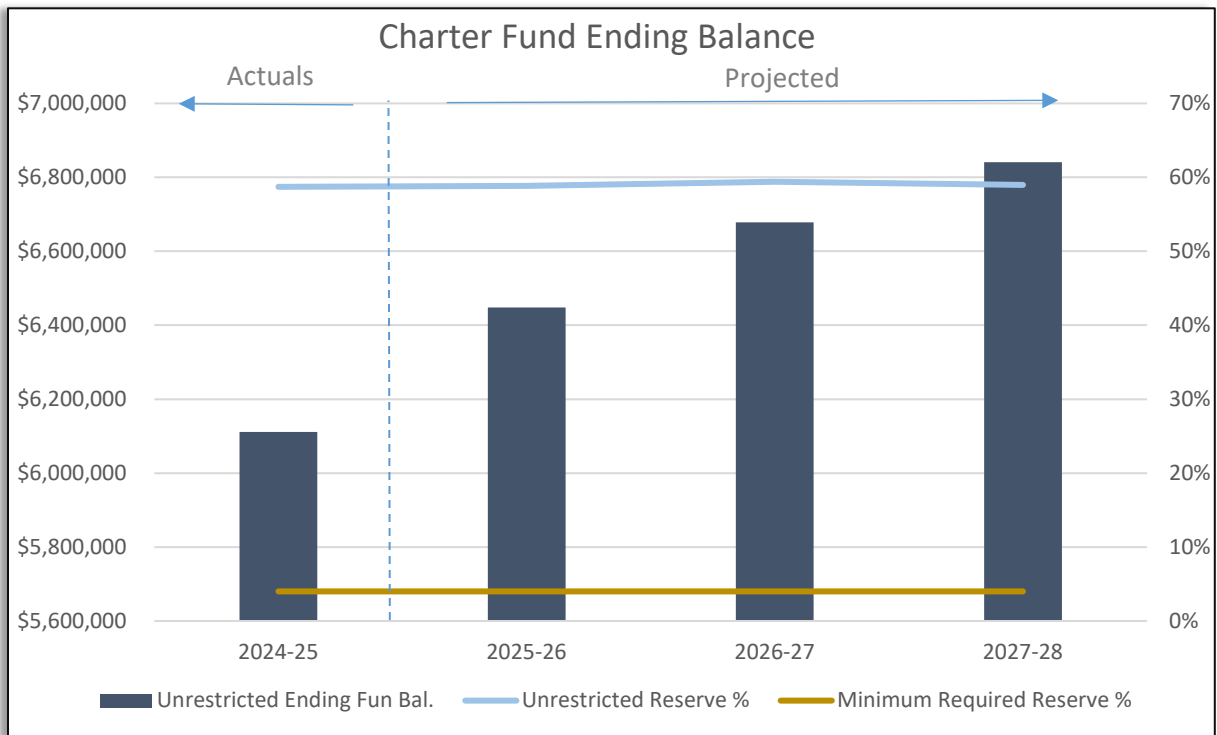
Deficit Spending / Ending Fund Balance / Reserve for Economic Uncertainties

The 2025-26 second interim budget report projects the following impacts to the unrestricted general fund:

Fiscal Year	Unrestricted Surplus/(Deficit)	Unrestricted Ending Fund Balance	Reserve for Economic Uncertainties (Ending Fund Balance/Total Expenditures)
2025-26	\$337,223	\$6.45 million	58.84%
2026-27	\$230,318	\$6.68 million	59.40%
2027-28	\$162,636	\$6.84 million	58.96%

2025-26 Second Interim Report
 Community Montessori
 June 18, 2026
 Page 3 of 5

The San Diego County Office of Education requires the charter school to maintain a reserve for economic uncertainties (REU) equal to 4% of expenditures. The charter school projects that it will meet this requirement in 2025-26 and beyond. The following chart displays the charter school’s unrestricted ending fund balance and REU from fiscal year 2024-25 through the projection period.



Multiyear Projection

The table below shows the assumptions used by the charter school.

Assumption	2025-26	2026-27	2027-28
Cost-of-Living Adjustment (COLA)	2.30%	3.02%	3.42%
CalSTRS	19.10%	19.10%	19.10%
Salary Step and Column	3%	3%	3%
Contributions to Restricted Programs	\$675,000	\$985,000	\$1.05 million

2025-26 Second Interim Report
 Community Montessori
 June 18, 2026
 Page 4 of 5

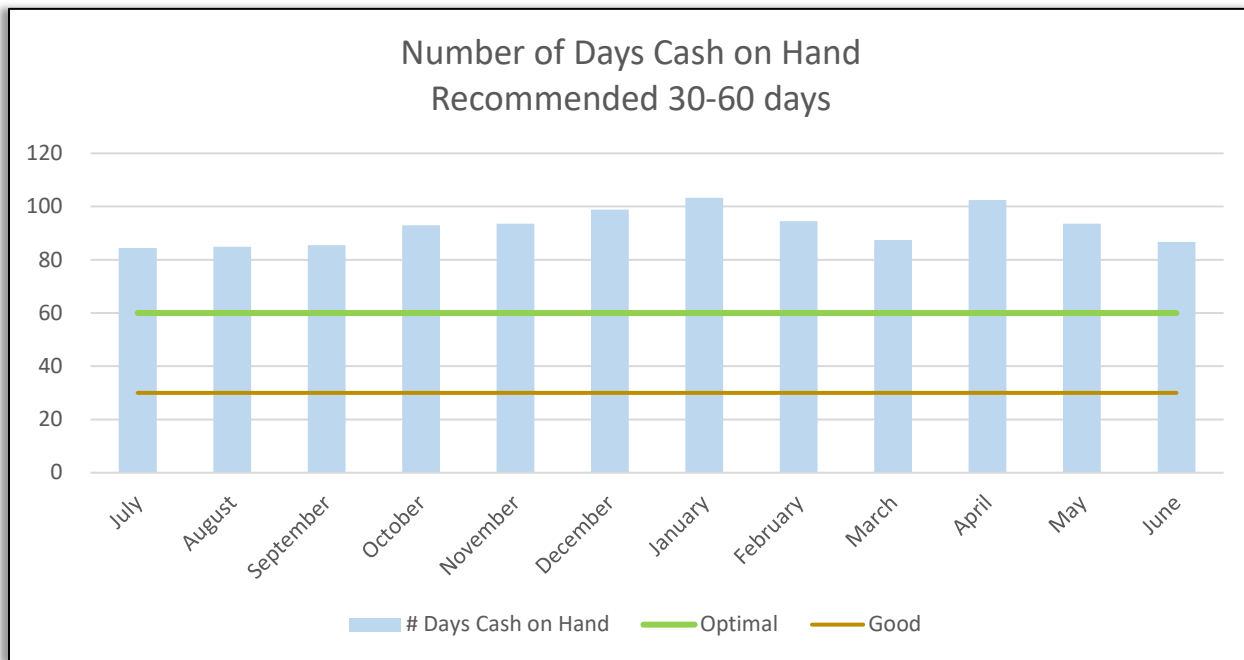
We have reviewed the charter school’s assumptions for the multiyear projection, and they appear to be reasonable. Based upon these assumptions, the charter school will meet the required reserve percentage.

In our review we noted the following:

- Revenues have been adjusted to reflect the expiration of one-time funds in the two subsequent fiscal years.
- Personnel salaries are projected to increase by 3% in each of the subsequent fiscal years. The charter school has indicated that the current staffing level is expected to accommodate projected enrollment growth.
- Non-personnel costs in the subsequent fiscal years have been escalated in alignment with historical trends and projected inflation.
- Buildings and improvements expenditures to reflect higher-than-projected costs associated with the barn construction project.

Cash Flow

The charter school industry recommends that charter schools maintain a cash balance between 30 and 60 days of cash on hand. The cash flow submitted with the 2025-26 second interim budget report projects a positive cash balance in all months. Cash on hand for Community Montessori is projected to range from 84 to 103 days.



2025-26 Second Interim Report
Community Montessori
June 18, 2026
Page 5 of 5

The submitted cash flow does not reflect the impact of the state's June principal apportionment deferral (EC 14041.6(k)). As part of our review, SDCOE analyzed the cash flow incorporating the effect of the June 2026 deferral. Under this adjusted scenario, the projected cash balance remains positive; however, it would decrease from the reported level of \$2.6 million to approximately \$2.0 million, and from 87 to 67 days of cash on hand.

Long-Term Debt and Liabilities

Community Montessori currently has loans through Wells Fargo Bank in the amounts of \$1.175 million and \$1.150 million for the purchase of the Poway and Oak Hill properties. Each loan has a 15-year term, with maturity in December 2029 and September 2033, respectively. The combined amount due in 2025-26 is \$210,031. Based on the second interim report, the charter school will be able to meet this commitment.

Conclusion

Community Montessori's second interim report reflects positive financial indicators, including growth in enrollment and ADA, projected budget surpluses, and reserves that exceed the required minimum. The multiyear projection, cash flow, and long-term obligations indicate that the school is financially positioned to meet its commitments in the current and two subsequent fiscal years.

We appreciate Community Montessori's efforts to ensure fiscal solvency. Should any adverse circumstances arise, that would negatively impact the financial condition of the charter school, please notify our office as soon as possible.

If you have any questions concerning this review, please feel free to contact Anna Buxbaum at abuxbaum@sdcoe.net, or at 858-290-5899.

Sincerely,



Kristin Armatis
Executive Director, Charter School Services

cc: Chris Nunley, Board President, Element Education
Doug Miller, Chief Business Official, Element Education
Melanie Baier, Coordinator, Charter School Services, SDCO

Coversheet

Consideration of Amendment of Articles of Incorporation

Section: XI. Action Item(s) for Element Education
Item: A. Consideration of Amendment of Articles of Incorporation
Purpose: Vote
Submitted by: Doug Miller
Related Material: EEI Article Amendment June 2026.pdf

BACKGROUND:

In January 2026, CalSTRS issued Employer Directive 2026-01, which provides new guidance regarding CalSTRS eligibility and reporting requirements for charter schools and nonprofit public benefit corporations (NPBCs) that operate charter schools. As part of this directive, charter schools and NPBCs are required to complete a CalSTRS Charter School/Nonprofit Public Benefit Corporation Certification form by June 30, 2026.

The certification requires the organization to affirm that its governing documents are consistent with IRS Notice 2015-07, which governs participation of charter school employees in governmental retirement plans. Among other requirements, the certification states that upon dissolution, the corporation's remaining assets must be distributed to the State of California, another governmental entity, or another qualifying public educational organization.

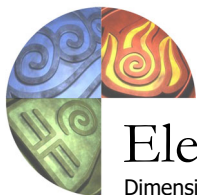
A review of Element Education's governing documents determined that while the Articles of Incorporation and Bylaws contain nonprofit and public benefit language, they do not expressly include the dissolution language referenced in the CalSTRS certification. The proposed amendment adds clarifying language to ensure that the Corporation's assets remain dedicated to public and educational purposes and are distributed to qualifying public entities upon dissolution.

Approval of the amendment will strengthen alignment with current CalSTRS requirements and support the organization's ability to execute the required certification.

Financial Impact: N/A

RECOMMENDATION:

Approve the amendment of the Articles of Incorporation



Element Education Inc.

Dimensions Collaborative School and Community Montessori

Certificate of Amendment of Articles of Incorporation

The undersigned certify that:

1. They are the President and the Secretary, respectively, of Element Education, Inc., a California nonprofit public benefit corporation, California Entity Number 2359964.

2. Article IV(B) of the Articles of Incorporation is amended to read as follows:

Upon dissolution, after payment of all debts and liabilities, the corporation's assets shall be distributed to the State of California, another governmental entity, or another nonprofit public benefit corporation or public charter school organized and operated exclusively for public educational purposes.

3. The foregoing amendment of Articles of Incorporation has been duly approved by the Board of Directors.

4. The corporation has no members.

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

Date: _____

President

Chris Nunley

Secretary

Terri Novacek

Coversheet

Consideration of Resolution Authorizing Preparation and Submission of Charter Renewal Petitions for Community Montessori and Dimensions Collaborative School.

Section: XI. Action Item(s) for Element Education
Item: B. Consideration of Resolution Authorizing Preparation and Submission of Charter Renewal Petitions for Community Montessori and Dimensions Collaborative School.
Purpose: Vote
Submitted by:
Related Material: Resolution.Charter Renewal 2026.pdf

RESOLUTION OF THE GOVERNING BOARD OF ELEMENT EDUCATION

AUTHORIZATION TO PREPARE, REVIEW, REVISE, AND SUBMIT CHARTER RENEWAL PETITIONS FOR COMMUNITY MONTESSORI AND DIMENSIONS COLLABORATIVE SCHOOL TO THE SAN DIEGO COUNTY OFFICE OF EDUCATION

WHEREAS, the Governing Board of Element Education serves as the governing authority for Community Montessori and Dimensions Collaborative School; and

WHEREAS, the charters for Community Montessori and Dimensions Collaborative School are scheduled for renewal and require the preparation and submission of charter renewal petitions to the appropriate authorizing agencies; and

WHEREAS, the Governing Board recognizes the importance of ensuring that the renewal petitions accurately reflect the schools' educational programs, operational practices, governance structures, and compliance with applicable laws and regulations; and

WHEREAS, the preparation of charter renewal petitions may require consultation with outside experts, contractors, and legal counsel to ensure the quality, accuracy, and completeness of the petitions; and

WHEREAS, revisions to the renewal petitions may be necessary throughout the drafting and review process to address feedback from staff, consultants, legal counsel, stakeholders, and authorizing agencies;

NOW, THEREFORE, BE IT RESOLVED that the Governing Board hereby authorizes Executive Director Terri Novacek, or her designee, to prepare, draft, revise, finalize, and submit charter renewal petitions on behalf of Community Montessori and Dimensions Collaborative School.

BE IT FURTHER RESOLVED that the Executive Director is authorized to engage and work with outside contractors, consultants, and legal counsel as deemed necessary and appropriate to assist in the development, review, editing, and refinement of the charter renewal petitions.

BE IT FURTHER RESOLVED that the Executive Director is authorized to make revisions, corrections, additions, deletions, and other modifications to the charter renewal petitions through the date of submission in order to improve the quality of the petitions, ensure legal compliance, respond to recommendations received during the review process, and address any technical or substantive issues identified prior to submission.

BE IT FURTHER RESOLVED that the Executive Director is authorized to execute and submit all documents, forms, certifications, and supporting materials necessary to complete the charter renewal application process for Community Montessori and Dimensions Collaborative School.

BE IT FURTHER RESOLVED that all actions taken by the Executive Director consistent with this Resolution are hereby authorized and ratified.

PASSED AND ADOPTED by the Governing Board of Element Education on this ___ day of _____, 2026, by the following vote:

AYES: _____

NOES: _____

ABSTAIN: _____

ABSENT: _____

CERTIFICATION

I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the Governing Board of Element Education at a duly noticed meeting held on _____, 2026.

Board President

Date: _____

Board Secretary

Date: _____

Coversheet

Consideration of the 26-27 Employment Manual

Section: XI. Action Item(s) for Element Education
Item: C. Consideration of the 26-27 Employment Manual
Purpose: Vote
Submitted by: Terri Novacek
Related Material: Employment Manual Rev 6.2026.pdf

BACKGROUND:

The Employment Manual is updated on an annual basis to incorporate any changes in policies or procedures. The Employment Manual has been reviewed and updated to align with new or revised policies and procedures, including: (1) Updating Director Function & Accountability (2) Technology, Internet, and Email updated to align with current policy, (3) Title IX policy inserted, (4) Procedures for use of work phone/number, (5) Employment condition for internal use of employee likeness, media, and digital recording, and (6) updated calendar and compensation matrices.

RECOMMENDATION:

Approve the 26-27 Employment Manual



Employment Manual

2026-2027

Approved June 2026

TABLE OF CONTENTS

INTRODUCTION	7
About Element Education	7
Schools/Programs	8
Director Function and Accountability	8
Right to Revise	11
At-Will Employment Status	11
Equal Employment Opportunity	12
Mandated Reporters	12
Criminal Background	12
HIRING	13
Full-Time Employees	13
Part-Time Employees	13
Temporary Employees	13
Exempt vs. Non-Exempt Employee	13
Transfer and Promotions	13
Job Duties	14
Nepotism	14
Remote Worker Procedure	14
BENEFITS	15
Health Benefits	15
Supplemental Insurance	16
Retirement	16
Other Benefits	16
Employee Assistance Program (EAP)	17
Workers Compensation Insurance	17
California State Disability Insurance	18
Paid Family Leave	18
TIME OFF	18

Paid Time Off (PTO)	19
Unapproved Absence	21
Personal Leave	21
LEAVE OF ABSENCE	21
Acronyms:	22
Pregnancy Disability Leave (PDL): Pregnancy, Childbirth or Related Conditions	22
Family and Medical Leave	23
Alcohol and Drug Rehabilitation Leave	26
Bereavement Leave	27
Family School Partnership Act	27
Kin Care Leave	28
Jury Duty and Witness Leave	28
Organ Donor Leave	28
Reproductive Loss Leave	29
Victims of Domestic Violence, Sexual Assault, Stalking, Crimes that Cause Physical Injury or Mental Injury, and Crimes Involving a Threat of Physical Injury; And of Persons Whose Immediate Family Member is Deceased as a Direct Result of a Crime	29
Voting Leave	30
Job Protected Leaves	30
STAFF DEVELOPMENT AND TRAINING	31
Annual Staff Training	31
August Orientation	31
New Hire Orientation	31
Administrative Staff Meetings	31
Classified Learning Center Staff Meetings	32
Instructional Staff Meetings	32
Regional Meetings	32
Attendance at Meetings	32
Professional Learning (PL)	33
Professional Learning Plan and Reflection (PLPR)	34

Educator Video Observations	35
Coaching	35
Documentation	35
MANAGEMENT	36
Open Door Communication	36
Grievance Procedure	36
Personnel Records	36
Enrollment of Children of Credentialed Staff	37
COMPANY PROPERTY	38
Organization Materials	38
Computer Software (Unauthorized Copying)	38
Proprietary Information	38
COMMUNICATION	39
Communication Devices	39
Work Phone or Work Number	39
Technology Use	40
Internet and E-mail Use	40
General Etiquette	41
Work Phone or Work Number	41
Recorded Messages	42
Email	42
Voicemail	42
EMPLOYEE CONDUCT	42
Rules of Conduct	43
Confidentiality	44
Conflict of Interest	44
Outside Employment	45
Solicitation and Distribution	45
Sexual Harassment	45

Student / Employee Interaction	46
Substance Use and Abuse	47
Theft	48
Weapons	48
Dress Standards	48
Punctuality and Attendance	49
Prohibition of Discrimination, Harassment, Intimidation, and Bullying	50
COMPENSATION	50
Deductions from Paycheck (Mandatory)	50
Paycheck Distribution	51
Work Week	51
Pay Cycle	51
Error in Pay	51
Wage Assignments (Garnishments)	51
Reporting Time Pay – Inclement Weather and “Acts of God”	51
Payroll System	52
Electronic Timecards and Records	52
Meal and Rest Periods	52
Business Expense Reimbursements	54
Payroll Dates	54
Compensation Matrices	54
SAFETY AND HEALTH	54
Distracted Driving	54
Ergonomics	55
Health and Safety	56
Workplace Violence	56
Lactation Accommodation	56
COVID-19	57
Disabilities and Reasonable Accommodations	57

TERMINATION	57
Voluntary Resignation	58
Involuntary Resignation	58
At Termination	58
Exit Interview	58
Letters of Reference and Employee Verification	59
GENERAL EMPLOYMENT	59
Advertising	59
Trademarks and Logos	59
Internal Use of Employee Likeness, Media, and Digital Recordings – Condition of Employment	59
Organization Services	60
To Obtain Students	60
Business Cards, Stationery, Envelopes, etc.	61
Promotional Items	61
Activities and Programs	61
Annual Notification Of The Uniform Complaint Procedures (UCP)	61
Title IX	63
RESOURCES	66
Professional Learning Plan and Record (PLPR) Reference Sheet	66
Dress and Grooming – Students	70
Element Education Calendar	73
Compensation Matrices	74
Employee Acknowledgments and Confirmation of Receipt	76

INTRODUCTION

Welcome to Element Education

Element Education, Inc. (Element) is excited to welcome you to the new school year. We look forward to a positive and productive year ahead, and we are thrilled that you have chosen to be a part of our team. By joining the Element team, you demonstrate that you:

- Are committed to our mission of empowering students to discover and develop *their* element.
- Recognize your role as a valuable member of a collaborative and purpose-driven team
- Embrace open communication and feedback that is respectful, constructive, and solution-oriented.
- Strive for excellence in your own growth while inspiring and uplifting those around you.

As an Element staff member, your skills and knowledge extend beyond those in a traditional office or educational environment. An effective employee is dedicated to mastery of the responsibilities within the scope of the job description, as well as supporting other members of the team. As an Element employee, you support the expected learning results of mastery, autonomy, and purpose. No doubt you wear many hats. As such, professional growth will look different for each staff member.

Our best successes have come from working as a team. Many opportunities are available for contributing to the growth and development of Element and we encourage you to make the most of these unique experiences.

We are glad to have you with us and look forward to all we will accomplish together.

About Element Education

The Purpose of Element is to develop and operate charter schools which create avenues for “new instruction, new management, and new governance in public schools.” The schools operate at the forefront of education as research and development labs to influence educators and policy makers on the changing needs of public education and promote educational variety.

The Mission of its schools and programs is to promote a culture of mastery, autonomy, and purpose for all stakeholders through personalized learning plans developed with insight and experience of learning styles, appropriate resources, and learning networks for success in work, life, and citizenship.

Learners are empowered to engage in deeper and meaningful learning by collaborating with mentors to

create and follow a learning plan and design a network which integrates specific standard with their unique learning needs and interests. They work with others both within and outside their grade level and have access to facilitators and mentors with a wide variety of interests and backgrounds. Mastery is demonstrated by making progress toward expertise in areas related to their educational goals and serves as the primary goal for the work. Learning is driven by mastery rather than rewards. Autonomy is given through choice and self-directed learning activities. Learning has purpose by engaging in meaningful discussions, activities, and work products which contribute to something larger than themselves in their educational journey. Everyone is a learner in a learning ecosystem.

The Vision of Element is to create model programs for deep and meaningful learning and attract and develop innovative and effective educators who instill the mindset and skills for developing agency in, and ownership of, life-long learning.

Schools/Programs

Element is a non-profit corporation which oversees two publicly funded charter schools.

Community Montessori, 2018 (Formerly Community Montessori Charter School (2013) and reopened as a county-wide benefit)

K-8, independent study, public charter school serving families who desire a Montessori environment. Learning centers provide up to four-day per week instruction for those in which a classroom environment is a good fit. School Days: 175 days per year.

Dimensions Collaborative, 2018 (Formerly Dehesa Charter School (2001))

K-12, independent study, public charter school serving families who desire a high level of control over the learning environment. Learning centers provide one to four days of instruction for those in need of or who desire a more structured learning environment for implementation of part of the student's learning plan. School Days: 175 days per year.

Director Function and Accountability

Executive Director ED (Visionary) - Terri Novacek

Vision and Culture (SDL and personal responsibility)

Research and Development

Governance and Strategic Planning

Authorizer Relations

Charter Renewal

Major external relationships

Public Relations Element Education

Advocacy

Element U – Learning and Development

- Executive Assistant

Chief Operations Officer COO (Integrator) - Roland Yung

Employee recruiting and hiring

Independent Contractors

P&L results

Communication across the organization

Facilities management (design, construction, maintenance, equipment, safety, meal program)

Operations compliance and reporting

Admissions and Enrollment

Accountability Reporting – Williams Act, UCP

Resource Adoption and Management Research and Evaluation Manager

- Research and Evaluation Manager
 - Registrar (ADA, Immunization, CALPADS)
 - Administrative Specialist – Student Services & Records
- Operations & Safety Manager
 - Administrative Specialist – Operations (Admin)
 - Maintenance/Custodian

Chief Business Officer (Finance) - Doug Miller

AR/AP

Budgeting

P & L Planning

Reporting – Budgets, unaudited actuals, check-runs

IT

Payroll

- Administrative Specialist - Business
- Technology Manager

Director of Human Resources (Admin) - Kiran Sihota

Office Management

Labor and Employment Compliance

Employee Recruitment, Hiring, and Onboarding

Safety: Emergency Procedures and Training

Annual reporting – CBEDS, CalSAAS, EEO-5, CA Pay Transparency, OSHA

Learning and Development Monitoring

Teacher Credentialing

Volunteer and Student Intern Recruitment and Onboarding

- Administrative Specialist – Human Resources
- Operations & Safety Manager

Director of Student Services - Niki Sestina

Assessment, monitoring, compliance (CAASPP, PFT, TOMS, MOODLE)

Special Education Program & Compliance – Manage credentialed staff

(Alternative Dispute Resolution, Due Process, CDE Compliance)

Service Provider performance and operations

- Special Education Program Manager
 - Operations compliance and management (CALPADS, SEIS)
 - Manage Related Service Provider Aides
- Assessment & Accountability Manager
 - Assessment, monitoring, compliance (CAASPP, ELPAC, PFT,)
- Behavior Counselor
 - Positive Discipline Leadership and accountability
- Student Support Manager – MTSS
 - Assessment/Data collection, management, and analysis (iReady, Amira, CAASPP, SDL, Power Traits)
 - Student Success Team Leader
 - English Language Development (ELD, ELPAC, MLAC)
 - Manage 504s
 - McKinney Vento liaison
 - Foster Youth
 - Manage Instructional Aides
- Administrative Specialist - Student Services & Records

School Director (SD) - Earl Otte and Paul Johnson

- Quality control (EF performance and operations)
- Customer service, relations, and results
- Marketing and Enrollment Management
- Resource adoption
- Learning and Development Implementation
- Process Management
- Operations compliance and reporting (LCAP, SARC, WASC)
- Accreditation
 - Regional Managers
 - Manage Learning Assistants
 - Daily oversight (EF performance and operations)
- Administrative Specialist - Operations
- Administrative Specialist - Resources

Learning Centers	
ED (via professional learning)	COO (via contractors)
Culture	Physical Space
Instruction	Design
Class management (expectations, behaviors)	Maintenance
	Resources, supplies, furnishings
SD	
Quality Control	
Curriculum adoption and training	

RM
Daily Operations Liaison

Right to Revise

This employment manual incorporates, by reference herein, all employment policies, procedures and practices of Element in effect at the time of publication. All previously issued manuals and any inconsistent policy statements or memoranda are superseded.

Element reserves the right to revise, modify, delete, or add to any and all policies, procedures, work rules, or benefits stated in this manual or in any other document, except for the policy of at-will employment. Changes to the nature or provisions of an at-will agreement must be in writing and must be signed by the Executive Director.

Employees will be notified of any new or revised policies via approval by the Governing Board at a public board meeting. The approved policies will be incorporated by reference and will supersede any previous policies. Employees will be notified of any new or revised procedures approved by the Executive Director via email or Element/School-specific newsletter. No oral statements or representations can in any other way alter the provisions of this manual.

This manual sets forth the entire agreement between you and Element as to the duration of employment and the circumstances under which employment may be terminated. Nothing in this employment manual or in any other personnel document, including benefit plan descriptions, creates or is intended to create a promise or representation of continued employment for any employee.

[Element Education Policies and Procedures](#)

At-Will Employment Status

As a member of Element's team, employees will be expected to contribute their talents and energies to improve the environment and quality of Element. In return, employees will be given opportunities to grow and advance in their career.

Continued employment, compensation, advancement, and benefits are based on position, good performance and growth, a good team attitude, and longevity; however, all employment with Element is "at will." All persons, including professional staff and faculty, employed by Element, are "at will" employees and either party may terminate the employment relationship with or without cause and with or without advance notice at any time by the employee or Element. Nothing in this manual shall limit the right to terminate at-will employment. Nothing in this at-will statement is intended to interfere with an employee's rights to communicate or work with others toward altering the terms and conditions of his or her employment.

No manager, supervisor, or employee of Element has any authority to enter into an agreement for employment for any specified period of time or to make an agreement for employment other than at-will

Page | 11

terms. Only the Executive Director has the authority to make any such agreement, which is binding only if it is in writing.

Equal Employment Opportunity

Element is an equal opportunity employer and makes employment decisions on the basis of merit. We want to have the best available persons in every job. Element expressly prohibits unlawful discrimination based on ancestry, age, color, disability, genetic information, gender identity and gender expression, marital status, medical condition, military or veteran status, national origin, race, religion, reproductive health decision making, sex and gender, sexual orientation, or any other protected status in accordance with all applicable laws.

Element is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to all persons involved in Element operations and prohibits unlawful discrimination by any employee of Element, including supervisors and coworkers.

Workplace discrimination and harassment based on any listed characteristic is prohibited. Any complaints of violation of this policy need to be brought to the attention of the Executive Director or Director of Human Resources. No retaliation will be made.

Reasonable Accommodations

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, Element will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual who is an applicant or an employee unless undue hardship would result. Any applicant or employee who requires accommodation to perform the essential functions of the job should contact the Director of Human Resources and discuss the need for an accommodation. Element will engage in an interactive process with the applicant or employee to identify possible accommodations, if any, which will help the applicant or employee perform the job. If the accommodation(s) is reasonable and will not impose an undue hardship, Element will work with the employee through the interactive process to implement the requested accommodation(s). A qualified individual with a disability has the right to refuse accommodation(s).

All employees, with or without accommodations, must be able to perform the essential functions of the job to the level required for the position.

Mandated Reporters

As an educational institution, we have a duty to protect children on behalf of the State of California. Element and all of its' employees are mandated to report suspected child abuse or neglect. All employees are provided with annual online child abuse training.

Criminal Background

The California State Education Code requires school employees to obtain a criminal background check and prohibits the employment or retention of an employee who has been convicted of any felony or

misdemeanor charges which pertain to the integrity of carrying out the duties of the position.

HIRING

Full-Time Employees

Regular full-time employees are those who are scheduled for and do work over 30 hours per week. Following the completion of the 30-day waiting period and commencing on the first of the following month, regular full-time employees are eligible for employee benefits described in this manual.

Part-Time Employees

Part-time employees are those who are scheduled for and do work fewer than 30 hours per week. Following the completion of the 30-day waiting period, part-time employees are eligible for the part-time benefits described in this manual. Part-time work schedules are determined by the Executive Director or designee.

Temporary Employees

Temporary employees are those who provide instruction, assist in the classroom, or perform other duties in the absence of a regularly assigned employee or on an as-needed basis. Temporary as-needed employees shall not be eligible for enrollment in health and welfare plans, any fringe benefits, or student enrollment preferences.

Exempt vs. Non-Exempt Employee

Exempt employees are defined as employees who:

- Make a minimum salary as determined by State and/or federal regulations,
- Carry out primary duties consisting of administrative, executive, or professional tasks, and
- Use discretion and independent judgement in daily work

Exempt employees are exempt from overtime, minimum wage, and rest break requirements. They are not limited to an 8-hour work day or a 40-hour work week.

Non-exempt employees do not fit the requirements of an exempt employee, must submit a timesheet, and are entitled to overtime, minimum wage, lunch breaks, and rest breaks.

Transfer and Promotions

Element will promote and transfer eligible employees whenever possible so as to enable employees to develop and grow. If the Executive Director or a School Director decides an employee is eligible to be transferred or promoted to an open or new position, it will be at the discretion of the Executive Director whether the employee will be directly transferred to the available position or whether the employee will

have to follow the employment process by submitting an application and being interviewed.

Job Duties

When you are initially hired, your supervisor will explain your job responsibilities and the performance standards expected of you. Be aware that your job responsibilities may change at any time during your employment. From time to time, you may be asked to work on special projects or to assist with other work necessary or important to the operation of your specific work setting at Element. Your cooperation and assistance in performing such additional work is expected.

Element reserves the right, at any time, with or without notice, to alter or change job responsibilities, reassign or transfer job positions/locations, or assign additional job responsibilities.

Nepotism

No one with supervisory responsibility shall hire or recommend hiring any family member. No employee shall be directly supervised or evaluated by a relative.

In the event of a lack of candidates, a need for specialized skills, or unique circumstances, the restriction against hiring relatives may be waived in the best interest of Element upon recommendation of a review committee comprised of the Executive Director and appropriate administrator or Director, and upon approval of the Governing Board.

When other qualified candidates have not applied, task assignments of short duration (generally less than sixty (60) working days), may be exempt from these guidelines.

Remote Worker Procedure

Remote Work Definition

Remote work is defined as an employee who has received approval by their supervisor to not come into the office or workplace to work during core business hours but works from home or another established location either full or part-time. The employee must be available and accessible by phone, email, and Microsoft Teams during agreed upon scheduled core business hours as determined by their Supervisor. Core business hours are defined as 8am to 4pm Monday to Friday.

Responsibilities

An employee must be willing and able to fulfill all duties as listed in the position's job description.

Home Office Space

Any home office space must be a distraction-free environment that allows the employee to perform job duties of position, attend virtual meetings, conduct virtual classes, and answer Microsoft Teams calls in a professional manner.

Expenses Incurred While Working Remotely

Work/Office Space Not Provided: A stipend will be provided to cover expenses incurred as a result of working remotely including, but not limited to supplies, internet, and phone use. If an employee feels his or her expenses exceed the allocated reimbursement amount, the employee shall meet with the Director of Human Resources for further consideration.

Work/Office Space Provided: Remote work is not mandatory for your position and fulfillment of your duties. You have been provided with a work office space to complete all required duties. If you choose to work remotely, after receiving approval from your supervisor, you are not entitled to reimbursement for any home office expenses.

At-Will Agreement

Being a remote worker does not change or alter the at-will relationship between Element or the employee.

Confidentiality

Security of confidential information is of primary concern and importance to Element. Remote workers, like all Organization employees, are expected to adhere to all applicable laws, rules, regulations, policies, and procedures regarding confidential student and employee/employer information.

Health and Safety

Failure to maintain a proper and safe work environment, while working remotely, may be cause for terminating an employee from the remote worker program.

If an employee incurs a work-related injury while working remotely, worker's compensation laws and rules apply just as they would if such an injury occurred at the main office. Employees must notify their supervisor immediately and complete all necessary documents regarding the injury.

BENEFITS

Element is committed to providing benefits for eligible employees. The benefits plan year runs from September 1st to August 31st and, accordingly, open enrollment for benefits is held in August. Payroll deduction are prorated over 20 pay periods.

Full-time and Part-time employees become eligible for benefits on the first of the month following 30 days of employment.

Health Benefits

Element offers medical, dental, and vision benefits for full-time employees. Element will contribute a set amount to the premium costs for **medical, dental, and vision** per year. The Element contribution amount can be found on the Element Staff Portal. Premiums for these benefits, beyond the Element contribution

amount, will be deducted from the employee's paycheck. **Health Savings Account (HSA)** for select medical benefits are available.

For any changes in medical insurance coverage, employees are required to contact the Director of Human Resources within **30 days of the qualifying event**. Qualifying events include:

- Loss of coverage (for a spouse or dependent);
- Eligibility for Medicare or loss of dependent coverage;
- Dependent child is no longer eligible under the plan;
- Legal divorce or separation;
- Reduction of hours (to part time status);
- Death or termination of covered family member; or
- Birth, adoption, or any additions to the plan.

Supplemental Insurance

Element offers the following supplemental insurances for full-time and part-time employees:

- Accident
- Critical Illness
- Hospital Confinement
- Long Term Disability
- Short Term Disability

Retirement

Element automatically enrolls certificated employees in the California State Teachers Retirement System (**CalSTRS**), which is a public pension fund that provides retirement, disability, and survivor benefits. Element provides a matching percentage.

Element offers 403(b) and 457(b) retirement savings plans through San Diego County Office of Education's Fringe benefits consortium for all full-time and part-time employees. Element provides a dedicated matching percentage for the 403(b) plan for full-time classified employees. Enrollment forms can be found on the Element staff portal and can be submitted to the Director of Human Resources.

Other Benefits

Paid Time Off (PTO): All employees accrue PTO on a per pay period basis. More information can be found in the PTO section.

Element offers the following additional benefits for full-time employees:

- Group Life and AD&D Insurance (up to \$50,000; automatic enrollment)
- Voluntary Life Insurance and AD&D

- Flexible Spending Account (FSA): Medical and Dependents
- Legal
- Pet Insurance

Upon termination of employment with Element, benefits coverage will cease at the end of the termination month, if applicable. Element complies with federal and state laws regarding administration of health benefit plans. Should an employee have a qualifying event that would entitle them, or a member of their family, to continuation of coverage, or would entitle them to add or delete dependent coverage, the employee will be notified in writing of their rights in accordance with the Consolidated Omnibus Budget Reconciliation Act (COBRA).

Employee Assistance Program (EAP)

Element provides an EAP program for its employees. The program is intended to promote early identification and intervention and to guide and assist employees in the resolution of personal difficulties that affect job performance. Further information can be obtained from the Director of Human Resources.

Workers Compensation Insurance

Element, in accordance with state law, provides insurance coverage for employees in case of work-related injury. The workers' compensation benefits provided to injured employees may include:

- Medical care;
- Tax-free cash benefits to replace lost wages; and
- Assistance to help qualified injured employees return to suitable employment.

To ensure that you receive any workers' compensation benefits to which you may be entitled, you will need to:

- Immediately report any work-related injury to your supervisor;
- Seek medical treatment and follow-up care if required;
- Complete a written *Employee's Claim for Workers' Compensation Benefits* and return it to the Director of Human Resources; and
- Provide Element with a certification from your health care provider regarding the need for workers' compensation disability leave, as well as your eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to his or her same position held at the time the leave began or to an equivalent position, if available. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave. For example, if the employee on workers' compensation leave would have been laid off had he or she not gone on leave, or if the employee's position has been eliminated or filled in order to avoid undermining Element's ability to operate safely and efficiently during the leave, and no equivalent or comparable positions are available, then the employee would not be

entitled to reinstatement.

An employee's return depends on his or her qualifications for any existing openings. If, after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of his or her job because of a physical or mental disability, Element's obligations to the employee may include reasonable accommodation, as governed by the Americans with Disabilities Act (ADA). The law requires Element to notify the workers' compensation insurance company of any concerns of false or fraudulent claims.

Company-Provided Physician

Element provides medical treatment for work-related injuries through a medical provider network. A list of Medical Provider Networks (MPN) is available on the Element staff website, and available by contacting the Director of Human Resources.

Workers' Compensation and FMLA/CFRA

Employees who are ill or injured as a result of a work-related incident, and who are eligible for family and medical leave under state and federal law, will be placed on FMLA/CFRA during the time they are disabled and not released to return to work. The leave under these laws runs concurrently, and eligible employees will be on FMLA/CFRA for a maximum of 12 weeks in a 12-month period starting from the date leave is first taken. Element uses a rolling year to calculate the 12-month period.

California State Disability Insurance

State Disability Insurance (SDI) is a state mandated insurance program designed to aid employees who cannot work due to injury, illness, or disease not caused by their job. Employees are required to pay SDI premium payments. Payments are automatically deducted from pay.

Paid Family Leave

Employees may be eligible for Paid Family Leave (PFL) wage replacement benefits, which are funded through payroll deductions and coordinated through the Employment Development Department (EDD). PFL provides limited compensation for up to eight weeks when an employee needs to take leave from work to care for a parent, parents-in-law, child, spouse, registered domestic partner, grandparent, grandchild, or sibling who is seriously ill, or for a working parent who wants time to bond with his or her newborn, foster child, or newly adopted child. The PFL program does not provide employees with a right to a leave of absence; it is limited to a state-mandated wage replacement benefit.

TIME OFF

Element understands that the need may arise for an employee to take time off from work for a personal injury, illness/sickness, or other personal matters. Element provides paid time off (PTO) in accordance with California Labor Code 245, et seq., to applicable employees. The number of paid time off days are outlined in the employee's at-will agreement under the "Employee Benefits" section. Please refer to the Personal Time Off (PTO) or Personal Leave sections of Element's policies located online for more details.

Requests for time off (paid time off and leaves of absence) must be submitted into the payroll system during the same pay period in which the time off was taken. In addition, you are required to notify your Supervisor as soon as possible in order for arrangements to be made for the on-going performance of the employee's duties during this time. Supporting documentation may be required to grant the request and/or to return to work.

An employee may be disciplined for any unapproved time off, unapproved leave of absence, leave without available PTO, or if leave is being used excessively or abused. Absences for multiple staff meetings or absences attached to multiple breaks or long weekends will be considered excessive and may lead to disciplinary action.

It is highly recommended that any travel plans, including booking flights and hotel rooms, not be made until approval is obtained from the Manager or Director, even if an employee has sufficient amount of PTO available to cover the absence.

When taking time off (PTO, personal, or other leave of absence), no work shall be performed, including, but not limited to, checking or responding to work emails.

Leadership may contact the employee to verify absence and/or return date if employee does not contact the Manager/Director. Such contact is not considered 'work'.

Paid Time Off (PTO)

PTO may be used for a variety of reasons including, but not limited to, travel/vacation, personal, and illness/sick leave. PTO requests may be denied, unless protected by federal, state, or local laws, for various reasons, including, but not limited to, staffing issues, number of previous absences, inadequate amount of PTO available, blackout days, or for absences requested during staff meeting or professional development days.

The PTO policy complies with and meets the minimum requirements of California's paid sick leave law. The accrual amounts for PTO meet or exceed the amount required, the usage of the PTO may be for sickness/illness of employee or family members as defined by law, and advanced notice of request for PTO due to sudden sickness/illness is not required if not practicable. Sickness/illness includes preventive care or diagnosis, care or treatment of an existing health condition, and for specified purposes for victims of domestic violence, sexual assault or stalking.

The minimum amount of PTO that can be used at any one time is one (1) hour. PTO must be used, if available, for any absence. PTO cannot be saved or accumulated for future use.

Accrual only occurs while an employee is actively working with Element and being paid during that payroll period. Accrual does not occur during any unpaid leave of absence or pay periods in which no paycheck is being provided.

To determine the amount of PTO allocated to an employee, the employee will need to reference their

at-will agreement.

Administrative Staff - PTO

Employees must provide reasonable advance notification to their supervisor, either verbally or in writing, if a need for PTO is foreseeable. If the need for PTO is unforeseeable, the employee must provide notice for the leave as soon as practicable.

If the employee is unable to report for work on any particular day, the employee must under all but the most extenuating circumstances provide notice for the leave as soon as practicable. The employee must inform their supervisor in-person or call the supervisor and email the Chief Business Officer, at least one day in advance before the time scheduled to begin working for that day. Text messages to the supervisor must only be sent to a work assigned number. In all cases of absence or tardiness, employees must provide their supervisor with an honest reason or explanation. Employees also must inform their supervisor of the expected duration of any absence.

All employees must submit a Time Off request in the payroll system within the same pay period in which the leave is taken. The Director or Manager will be responsible for approving or denying all requests. The minimum amount of PTO that can be used at any one time is one hour.

No PTO request is deemed as approved until the Manager or Director has approved the leave in the payroll system after verifying the availability of the requested amount of PTO.

10-Month School Employees

Employees must provide at least 2 weeks advance notification to their Manager and the School Director if a need for PTO is foreseeable. If the need for PTO is unforeseeable or the employee cannot notify their Manager and School Director in advance, such as sudden illness or sickness, the employee must provide notice for the leave as soon as practicable. The employee must either call the work number, inform their Manager in-person, or send a text message to their Manager. Text messages to a Manager or Director must only be sent to a work assigned number. The Director and Manager must also be informed via email. In all cases of absence or tardiness, employees must provide their supervisor with an honest reason or explanation. Employees also must inform their supervisor of the expected duration of any absence.

All employees must submit a Time Off request in the payroll system within the same pay period in which the leave is taken. The Director or Manager will be responsible for approving or denying all requests. The minimum amount of PTO that can be used at any one time is one hour.

No PTO request is deemed as approved until the Manager or Director has approved the leave in the payroll system after verifying the availability of the requested amount of PTO.

<u>Category</u>	<u>PTO Accrual Rate*</u>	<u>Carryover/Cap</u>
Part-Time and As-Needed	1 hour for every 30 hours worked	80 hours
New hire to five (5) years	Up to 40 hours	80 hours
Six (6) to nine (9) years	Up to 48 hours	88 hours
Ten (10) years or over	Up to 56 hours	96 hours

*PTO accrual rate is annually, based on the fiscal year, on a pay period basis.

Absences Attached to Breaks and Long Weekends: If approved and sufficient PTO is available, an employee may be absent up to one day which is attached to a long weekend or a break per school year.

All holidays and breaks are available on the school calendar.

Unapproved Absence

When an Unapproved Absence is inputted in the payroll system by the employee, the employee is acknowledging that they are aware the absence is not approved or job protected, is considered an excessive absence, and may lead to disciplinary action.

Any available PTO must be used prior to any Unapproved Absence entered in the payroll system.

When a supervisor approves an Unapproved Absence request in the payroll system, the Supervisor is acknowledging receipt of the time off request. The ‘approval’ title in the payroll system does not change the nature of the absence from unapproved to approved. If the employee takes the time off, it is still not an approved or job protected absence, is considered an excessive absence, and may lead to disciplinary action.

Personal Leave

Employees who have exceeded their PTO limit, may be permitted to take time off to attend to personal matters. Except in unusual circumstances, prior notice, at least 2 weeks in advance, must be given to the employee’s supervisor. Prior to the leave being taken, an employee must submit a written request to the School Director or to the Executive Director for approval. Requested leave must be for a minimum of three workdays. An employee’s pay will be adjusted accordingly and such leaves are not job protected leaves. Employees may be required to submit documentation or certifications.

LEAVE OF ABSENCE

All state and federal laws will be followed in the event that an employee requests a leave of absence. Any questions regarding the application of this policy to an employee’s particular situation should be submitted in writing to the Director of Human Resources. All requests for leave under this policy must be

submitted in writing to the Executive Director or designee for review within a reasonable amount of time from leave dates requested.

Acronyms:

Types of Leave:

PDL: Pregnancy Disability Leave
FMLA: Family and Medical Care Act
CFRA: California Family Rights Act

State Compensation:

SDI: State Disability Insurance
SDI/PFL: State Disability Insurance / Paid Family Leave
PFL: Paid Family Leave

Pregnancy Disability Leave (PDL): Pregnancy, Childbirth or Related Conditions

Duration of pregnancy disability leave will be determined by the advice of the employee's physician, but employees disabled by pregnancy may take up to 17 and 1/3 weeks of job-protected leave. Part-time employees are entitled to leave on a pro rata basis.

This leave includes any period of time for actual disability caused by the employee's pregnancy, childbirth, or related medical condition including, but not limited to, severe morning sickness and for prenatal care appointments. Element shall also reasonably accommodate medical needs related to pregnancy, childbirth, or related conditions or temporarily transfer the employee to a less strenuous or hazardous position, provided one is available, or duties if medically needed because of the pregnancy. An eligible employee also includes a transgender employee who identifies as a male and is pregnant.

Time off because of pregnancy disability, childbirth, or related medical condition does count as family and medical leave under federal law (the Family and Medical Leave Act - FMLA). Employees who take time off for pregnancy disability and who are eligible for FMLA will be placed on FMLA that runs concurrently (at the same time) as their PDL. Leave because of the employee's disability for pregnancy, childbirth, or related medical condition is not counted as time used under California law (the California Family Rights Act - CFRA).

Once the pregnant employee is no longer disabled, once the employee has exhausted PDL, the employee has given birth, and/or the employee's physician has placed them off of disability leave, then the employee may apply for leave under FMLA or CFRA, for purposes of baby bonding.

Leave Procedures

The Director of Human Resources must be contacted as soon as the employee realizes the need for PDL. If the employee cannot provide 30 days' notice, the Director of Human Resources must be informed as soon as is practical. The employee must consult with his or her supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of Element.

Certification

Element requires the employee to provide certification within 15 days of any request for PDL, unless it is not practicable to do so. If the employee does not provide medical certification in a timely manner to

substantiate the need for PDL, Element may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered approved PDL.

The employee must provide a certification from the health care provider stating:

- Date of commencement of the disability;
- Probable duration of the condition; and
- Inability of the employee to work at all or perform any one or more of the essential functions of his/her position because of the disability.

Family and Medical Leave

FMLA/CFRA Leave

State and federal family and medical leave laws provide up to 12 workweeks of unpaid family/medical leave within a 12-month period, under the following conditions:

- The employee has more than 12 months of service. If the leave is for FMLA only, the 12 months of service must have accumulated within the previous seven years. There is no such cap under CFRA;
- The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- The employee is employed at a work site where there are 50 or more employees within a 75-mile radius.

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

- The birth of the employee's child, or placement of a child with the employee for adoption or foster care (FMLA/CFRA);
- For incapacity due to pregnancy, prenatal medical care, or childbirth (FMLA only);
- For a serious health condition that makes the employee unable to perform duties of the employed position job (FMLA/CFRA).
- To care for the employee's spouse, child, or parent who has a serious health condition (FMLA/CFRA);
- To care for the employee's registered domestic partner, adult child, child of domestic partner, parent-in-law, grandparent, grandchild, sibling, or a "designated person" who has a serious health condition* (CFRA only);

When both parents are employed by Element and both request simultaneous leave for the birth, adoption, or foster care placement of a child, each parent is entitled to up to 12 workweeks in a 12-month period for CFRA leave for this reason.

Military Family Leave Entitlements

- Leave for a Qualifying Exigency- FMLA/CFRA

Eligible employees whose spouse, child, or parent is on covered active duty or call to covered active-duty status may use their 12-week FMLA/CFRA leave entitlement to address certain qualifying exigencies. Eligible employees whose domestic partner is on covered active duty or call to covered

active-duty status may use their 12-week CFRA leave entitlement to address certain qualifying exigencies.

- **Military Caregiver Leave - FMLA**

Eligible employees (spouse, child, parent, or next of kin) may also take a special leave entitlement of up to 26 weeks of leave to care for a covered service member with serious injuries or illnesses during a single 12-month period. (FMLA/CFRA for 12 weeks if the care provider is eligible for both, followed by 14 weeks of (FMLA only), or 26 weeks of FMLA only if the leave is not CFRA covered leave).

Calculating the 12-month Period

For purposes of calculating the 12-month period during which 12 weeks of FMLA, CFRA, or qualifying exigency leaves may be taken, Element uses a rolling year.

Under most circumstances, leave under federal and state law will run at the same time and the eligible employee will be entitled to a total of 12 weeks of FMLA leave and/or 12 weeks of CFRA leave in the designated 12-month period. For certain leaves, FMLA and CFRA leave run concurrently.

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

Carryover

Leave granted under any of the reasons provided by state and federal law will be counted as family/medical leave and will be considered as part of the 12-workweek entitlement (26-workweek entitlement if leave is to care for a service member) in a 12-month period. The 12-month period is measured forward from the date any employee's first Family and Medical Leave Act leave begins. Successive 12-month periods commence on the date of an employee's first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

Leave Procedures

The Director of Human Resources must be contacted as soon as the employee realizes the need for family/medical leave. Employees should complete a leave of absence form and provide it to the Director of Human Resources. If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for a serious health condition of the employee or a family member, the employee must notify the Director of Human Resources at least 30 days before the leave is to begin. The employee must consult with his or her supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of Element.

Certification

Element requires the employee to provide certification within 15 days of any request for family and medical leave under state and federal law, unless it is not practicable to do so. Certification(s) must

provide the start and end date for the requested leave. If the employee does not provide medical certification in a timely manner to substantiate the need for family and medical leave, Element may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered family and medical leave.

- Leave to care for others

If the leave is needed to care for a sick spouse, registered domestic partner, child, adult child, child of domestic partner, parent, parent-in-law, grandparent, grandchild, sibling, or a designated person, the employee must provide a certification from the health care provider stating:

- a. Date of commencement of the serious health condition;
- b. Probable duration of the condition;
- c. Estimated amount of time for care by the health care provider; and
- d. Confirmation that the serious health condition warrants the participation of the employee.

- Leave for own serious health condition

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

- a. Date of commencement of the serious health condition;
- b. Probable duration of the condition; and
- c. Inability of the employee to work at all or perform any one or more of the essential functions of his/her position because of the serious health condition.

- Leave Related to Military Service

A leave taken due to a "qualifying exigency" related to military service must be supported by a certification of its necessity. A leave taken due to the need to care for a service member shall be supported by a certification by the service member's health care provider or other certification allowed by law.

Health and Benefit Plans

An employee taking family medical leave will be allowed to continue participating in any health and welfare benefit plans in which the employee was enrolled before the first day of the leave (for a maximum of 12 workweeks, or 26 workweeks if the leave is to care for a covered service member) at the level and under the conditions of coverage as if the employee had continued in employment for the duration of such leave. Element shall continue to make the same premium contribution as if the employee had continued working. The continued participation in health benefits begins on the date leave first begins. In some instances, Element may recover from an employee any premiums paid to maintain health coverage if the employee fails to return to work following family/medical leave.

Employees on pregnancy disability leave will be allowed to continue to participate in group health coverage for up to a maximum of 17 and 1/3 weeks of pregnancy disability leave (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work.

Premium contributions not covered by Element are to be paid by the employee in order to maintain coverage. These payments are due when they would be made by payroll deduction. All such payments are to be made to the Chief Business Officer. If such payments are 30 days late and Element has provided a 15-day advance written notice of lack of payment, then Element's obligation to maintain health insurance coverage for the employee ceases.

Substitution of Paid Leave

Generally, FMLA/CFRA leave is unpaid. Element allows employees with Paid Time Off (PTO) to elect to use available PTO while taking FMLA leave. Element allows employees with PTO to elect to use PTO while taking CFRA leave.

Reinstatement

Under most circumstances, upon return from family/medical leave, an employee will be reinstated to the original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if the employee had been continuously employed rather than on leave.

Reinstatement after FMLA leave may be denied to certain salaried "key" employees.

Time Accrual

Employees on FMLA and/or CFRA leave will not continue to accrue other Element provided paid leave benefits (such as PTO) during unpaid FMLA and/or CFRA leave.

Intermittent Leave

Employees may take FMLA and/or CFRA leave intermittently (in blocks of time, or by reducing their normal weekly or daily work schedule) if the leave is for the serious health condition of the employee's child, parent, or spouse, or of the employee, and the reduced leave schedule is medically necessary as determined by the health care provider of the person with the serious health condition. The smallest increment of time that can be used for such leave is a one-hour minimum.

Alcohol and Drug Rehabilitation Leave

Alcohol and drug rehabilitation leave is time off granted to employees who wish to voluntarily enter and participate in an alcohol or drug rehabilitation program. Any requests for a leave will be considered requests for a reasonable accommodation.

Employees may be eligible for FMLA/CFRA leave for treatment purposes.

Employees may elect to use their available Paid Time Off for such leave.

Employees will be free from discrimination.

Bereavement Leave

Element provides up to five days of unpaid leave to eligible employees for the death of a spouse, child, parent, sibling, grandparent, grandchild, domestic partner, or parent-in-law. The complete leave does not need to be taken consecutively but must be completed within three months of the death of the family member.

Bereavement leave is only available to employees who have worked for Element for at least 30 days prior to the commencement of the leave.

To confirm the need for leave, Element may request documentation. Element allows employees to elect to use PTO leave, if available. The employee will be free from retaliation, interference, and discrimination.

Family School Partnership Act

Element will not discharge or discriminate against an employee for taking up to 40 hours off work each year (not to exceed eight (8) hours in any calendar month) to participate in the school activities of the employee's children who are in TK-12 or with a licensed childcare provider, if the employee, prior to taking the time off, gives reasonable notice to the employer that the employee is requested to appear in the school.

Element requires employees to use PTO, if available.

The employee shall provide documentation from the school or licensed childcare provider as proof that the employee engaged in permitted child-related activities on a specific date and at a particular time.

The following school activities are covered:

- To find, enroll, or reenroll the employee's child in a school or with a licensed childcare provider, or to participate in activities of the school or licensed childcare provider of the employee's child, if the employee, prior to taking the time off, gives reasonable notice to the employer of the planned absence of the employee. Time off pursuant to this subparagraph shall not exceed eight (8) hours in any calendar month of the year.
- To address a childcare provider or school emergency, provided the employee gives notice to the employer. Childcare provider or school emergency means that an employee's child cannot remain in a school or with a childcare provider due to one of the following:
 - a. The school or childcare provider has requested that the child be picked up, or has an attendance policy, excluding planned holidays, that prohibits the child from attending or requires the child to be picked up from school or childcare provider.
 - b. Behavioral or discipline problems.
 - c. Closure or unexpected unavailability of the school or childcare provider, excluding planned holidays.
 - d. A natural disaster, including, but not limited to, fire, earthquake, or flood.

Kin Care Leave

Kin Care Leave is leave provided to employees to take time off work to care for a family member. Family members include a child, parent, spouse, registered domestic partner, grandparent, grandchild, a sibling, or a designated person.

Employees may take time off work to:

- Seek diagnosis, care, or treatment for an existing health condition of an employee's family member,
- Support a family member who was the victim of domestic violence, sexual assault, or stalking by:
 - a. Assisting in medical care or transportation to medical care,
 - b. Seeking court relief,
 - c. Relocating victim's residence, or
 - d. Seeking counseling for abuse.

An employee may use up to half of their annual Personal Time Off, provided the employee has the requested amount available or will accrue up to the requested amount during the fiscal year. If the Personal Time Off has already been exhausted, then the absence is not covered under the Kin Care Leave.

Jury Duty and Witness Leave

Element encourages employees to serve on jury duty when called. Non-exempt employees are not eligible for pay while serving on jury duty or witness leave. Exempt employees will receive full salary unless they are absent for a full week and perform no work. Employees must notify their supervisor of the need for time off for jury duty as soon as a notice or summons from the court is received.

Employees must provide written verification from the court clerk of performance of jury service. If work time remains after any day of jury selection or jury duty, employees are expected to return to work for the remainder of their work schedule.

Non-exempt employees may choose to use available PTO for their absences. Exempt employees may choose to use available PTO if their absence is for a full week and no work is performed.

Organ Donor Leave

Eligible employees will receive up to 30 days in a 12-month period of paid leave to donate an organ to another person, and up to 5 days in a 12-month rolling period of paid leave to donate bone marrow to another person. An additional unpaid leave of up to 30 business days in a 12-month period may be granted to an employee donating an organ.

Employees will be required to use up to five days of their paid time off for leave under this policy to donate bone marrow, and up to two weeks of their paid time off for leave to donate an organ.

Certification

If the leave is needed for an organ donation, the employee must provide the Director of Human Resources with appropriate written certification that they are organ or bone marrow donors and that there is a medical necessity for the donation.

Reproductive Loss Leave

A reproductive loss event includes miscarriage, stillbirth, failed adoption, failed surrogacy, and unsuccessful assisted reproduction. A reproductive loss event means the day or, for a multiple-day event, the final day of a failed adoption, failed surrogacy, miscarriage, stillbirth, or an unsuccessful assisted reproduction.

To be eligible, employees must have been employed by Element for 30 days immediately preceding the commencement of leave. An employee can take leave following their own reproductive loss event or that of another person, such as spouse or partner, if the employee would have been the parent of the child born or adopted.

Employees may take up to five days of unpaid leave. The leave does not have to be consecutive. Leave must be completed within 3 months of the reproductive loss event.

If an employee experiences more than one reproductive loss event in a year, they are entitled to no more than 20 days of reproductive loss leave in that one-year period.

Reproductive loss leave is separate from, and in addition to, other types of leave to which employees are entitled.

Employees may elect to use available PTO during the leave, otherwise the leave will be unpaid. The employee will be free from retaliation, interference, and discrimination.

Victims of Domestic Violence, Sexual Assault, Stalking, Crimes that Cause Physical Injury or Mental Injury, and Crimes Involving a Threat of Physical Injury; And of Persons Whose Immediate Family Member is Deceased as a Direct Result of a Crime

Domestic violence is defined by the California Family Code as abuse perpetrated against any of the following persons:

- "A spouse or former spouse"
- "A cohabitant or former cohabitant" ("Cohabitant" means a person who regularly resides in the household. 'Former cohabitant' means a person who formerly regularly resided in the household.)
- "A person with whom the respondent is having or has had a dating or engagement relationship"
- "A person with whom the respondent has had a child, where the presumption applies that the male parent is the father of the child of the female parent under the Uniform Parentage Act."

- "A child of a party or a child who is the subject of an action under the Uniform Parentage Act, where the presumption applies that the male parent is the father of the child to be protected." (e.g. the male parent's name is on the child's birth certificate)
- Any other person related by blood or marriage within the second degree.

If an employee is a victim of domestic violence, sexual assault, stalking, crimes that cause physical injury or mental injury, crimes involving a threat of physical injury, or whose immediate family member is deceased as a direct result of a crime then the employee has the right to take time off from work to get help to protect the employee and the employee's children's health, safety, or welfare. Leave may be taken to get a restraining order or other court order, to get medical attention or services from a domestic violence shelter, program, or rape crisis center, to receive psychological counseling or mental health services, or to receive safety planning related to domestic violence, sexual assault, or stalking.

Before an employee is allowed to take leave from work, the employee must notify the Director of Human Resources of the domestic violence and the intent to take time off within a reasonable time of the intended leave, unless advance notice is not feasible.

If the time taken off work is unexpected or unscheduled, such as in a crisis situation, Element may require written documentation indicating that time off was for the reason of domestic violence. Proof is not required if advance notice is given.

Element allows employees to elect to use PTO leave, if available. The employee has the right to request reasonable accommodation and be free from retaliation and discrimination.

Voting Leave

If an employee does not have sufficient time outside of working hours to vote in an official state-sanctioned election, the employee may take off enough working time to vote. Such time off shall be taken at the beginning or the end of the regular working shift, whichever allows for more free time, and the time taken off shall be combined with the voting time available outside of working hours to a maximum of two hours combined. Under these circumstances, an employee will be allowed a maximum of two hours of time off during an election day without loss of pay. When possible, an employee requesting time off to vote shall give his or her supervisor at least two days' notice.

Job Protected Leaves

The employee is required to contact the Director of Human Resources for absences involving job-protected leave reasons. Job protected leave includes, but is not limited to:

- Pregnancy Disability Leave (PDL)
- Family and Medical Leave Act (FMLA)
- California Family Rights Act (CFRA)
- Alcohol and drug rehabilitation leave
- Bereavement leave
- Kin care leave

- Organ Donor Leave (The Michelle Maykin Memorial Donation Protection Act)
- Reproductive Loss Leave
- Victims of domestic violence leave
- California FEHA disability accommodations and Americans with Disabilities Act (ADA)
- California workers' compensation

STAFF DEVELOPMENT AND TRAINING

Annual Staff Training

The safety of our staff and students is of utmost importance. All Element employees are required to complete annual safety training, including mandated reporter (child abuse and neglect) training at the beginning of each school year. We are confident that you will find these courses to be informative and helpful towards maintaining a safe learning environment.

The required training is provided by Vector Solutions. Courses have been assigned to you. The courses have audio, so turn up your speakers if you wish to hear the narration. Complete all the training scenarios and the assessment to receive completion credit for the course. You do not need to print your Certificate of Completion since results are sent electronically. Feel free to take any additional courses of your choice after completing the assigned ones.

You are **required** to complete these courses within the first six weeks of hire or the August Orientation date. Failure to complete these courses within the required time frame may lead to disciplinary action, including possible termination.

If you have any questions or problems with the training website, please contact the Director of Human Resources.

August Orientation

Employees are required to attend training in August, prior to the beginning of the school year. This training is provided to bring everyone up to date on changes in policies, procedures, programs, and get focused for the upcoming year.

New Hire Orientation

All new hires are required to attend a new-hire orientation in August. This training is provided to orient the new employees with Element's philosophy, to provide needed equipment and logins, and to meet with Element's Administrative staff.

Administrative Staff Meetings

Meetings are held once a week, or as-needed, between administrative employees and immediate supervisors. The purpose of the weekly meeting is to provide the following opportunities:

- Receive timely updates and announcements of Element policies and procedures;
- Review calendars and discuss upcoming events;

- Engage in professional development;
- Discuss administrative issues; and
- Network with other classified administrative staff, if applicable.

Classified Learning Center Staff Meetings

Classified employees working at learning centers are required to attend meetings as per the school calendar, regional meetings as per work schedule, and required training and professional development.

Instructional Staff Meetings

Instructional staff members are required to attend monthly meetings. The purpose of the monthly meeting is to provide the following opportunities:

- Receive timely updates and announcements of policies and procedures;
- Review calendar and discuss upcoming events;
- Engage in professional development workshops;
- Discuss administrative issues;
- Network with other certificated staff members; and
- Turn in all paperwork for the month.

All staff meeting dates can be found on the School Calendar. Missing more than one staff meeting per school year may lead to disciplinary action.

If an employee is late to a staff meeting, which includes not ready to start and not having signed in by the start of the meeting, then the employee is considered truant and must input a minimum of one hour of PTO.

Regional Meetings

Instructional staff members are required to attend all regional meetings. The purpose of these regional meetings is to collaborate among peers on topics such as:

- Completing and reviewing paperwork;
- Evaluating student work;
- Providing parent and staff support;
- Meeting student needs;
- Monitoring student progress; and
- Planning regional events.

Attendance at Meetings

Employees are expected to attend all required and pre-scheduled meetings, whether in-person or virtual. Attendance at any required meeting includes engagement, active involvement, and input/feedback as requested. Working on 'other' work-related activities does not constitute attendance. Absences exceeding one meeting and/or without available PTO may lead to disciplinary action.

In the event an employee will be absent from a meeting, the employee will follow the request for PTO procedure, including providing prior notification to their supervisor. Employees without sufficient

amount of PTO will have their pay adjusted accordingly, unless special approval is granted by the School Director.

Employees are not permitted to stream into in-person meetings without prior approval by the supervising Director.

Virtual Meetings

If you are invited to a virtual meeting and cannot attend due to a pre-scheduled work conflict, you must decline the invite upon notice and provide an alternative date and time.

The employee who is setting up the meeting has the discretion of indicating whether an employee is required to attend. Attendance is based on multiple factors including participant's position, topic of the meeting and/or engagement level requested. All invited participants must be designated as required or optional when scheduling virtual meetings.

Employees are strongly recommended to have their cameras on during virtual meetings. Element understands that there are circumstances when the camera cannot be turned on. If you are unable to turn on your camera due to technological issues with the Element issued device, you must contact the Technology Manager to correct the issue.

Professional Learning (PL)

Employees reflect our organization as a whole and are expected to consistently pursue excellence, ensure relevance, and spark innovation. As such, Element provides required training at monthly staff meetings for instructional staff members, and quarterly trainings for support staff. Training is also offered to all employees periodically in the areas of technology, curriculum, and educational practices. All employees are encouraged to attend these complimentary and optional training sessions.

To further support ongoing professional learning, Element budgets an annual allotment of \$200 per employee for discretionary support in professional learning such as books, training videos, workshops, conferences, and webinars. When an employee wants to request professional learning, a formal request can be made using the Professional Learning Request form at least one month prior to the course, seminar, membership registration deadline, etc. to the School Director or Executive Director. Any requests submitted with a shorter registration deadline are at greater risk of not being approved. Such requests are to be registered and paid for through Element's administrative office, rather than through employee reimbursement.

Some considerations for eligibility of reimbursement will be:

- Topic
- Cost
- Pertinence to role in organization
- Impact on student learning and staff excellence

You will be asked to explain the following in the request:

- How does this relate to your professional growth goals which support student agency, employee accountability, and/or long-term sustainability?
- How does this connect with Element's principles for self-determined learning?
- How will this professional development further what you are already doing in your position?
- How will other staff benefit from your experience?

Staff are supported in learning as a community and may propose pooling funds or exceeding funds as a group. Those who do must be willing to share and assist with implementation of the learning at all learning centers.

Professional Learning Plan and Reflection (PLPR)

The aim of the PLPR is to give you the opportunity to plan your own professional learning and to reflect on how it has gone over the course of the school year.

You will meet with your immediate supervisor at a minimum of three times a year, beginning, middle and end, to go over your PLPR. The end of year meeting will also be attended by your Manager or Director.

[See Resources](#)

All employees will complete a Professional Learning Plan and Reflection (PLPR). The PLPR will be used as a working document throughout the year to document performance, goals, achievement strategies, and professional learning. In addition to periodic performance reviews, formal performance reflections will be conducted annually by a supervisor. The frequency of performance reflections may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance issues. The failure to conduct a performance reflection will not alter the at-will nature of the employer-employee agreement or provide reason not to terminate.

Your performance reflection may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude, your attitude toward others, your growth mindset and contribution to Element, and strategies utilized and results obtained within your set professional goals.

The PLPRs are intended to make you aware of your progress, areas for improvement, and objectives or goals for future work performance. Favorable performance reflections do not guarantee increases in pay or promotions. Pay increases and promotions are solely within the discretion of Element and depend upon many factors in addition to performance, such as professional growth and contribution to the development of the organization.

After the review, you will be required to sign the PLPR to acknowledge that it has been presented to you, that you have discussed it with your supervisor, and that you are aware of its contents. You will have 10

working days from the receipt of the review to submit any signed written comments to be attached to the PLPR. These comments are to be submitted to the Director of Human Resources.

All PLPRs, regardless of whether an employee signs the document, are placed in the employee's personnel file.

Educator Video Observations

The use of video recordings may be made to supplement performance reflections, to provide an additional self-assessment/reflection mechanism, and to connect teachers to peers for feedback and coaching.

In addition, the use of video cameras may be needed to ensure the health, welfare, and safety of all employees, students, and visitors. If such a need arises, employees will be provided with notification prior to the installation of any such cameras.

Coaching

Written coaching sessions may be conducted, as necessary, to assist employees in meeting professional obligations regarding performance. The purpose of the written coaching session is to notify the employee of areas of improvement that are needed in conduct and/or performance. The intent is to define the seriousness of the situation and steps for improvement so that the employee may succeed in his/her position.

The Executive Director or Director of Human Resources may administratively refer employees to the EAP program when job performance has reached the level of disciplinary action. A referral to the program may also be incorporated into a coaching session as part of the plan for improvement. Depending on the severity of the behavior and the applicability of the EAP program to the disciplinary action, the employee may be given a choice of disciplinary action or acceptance of a referral to the EAP program in lieu of disciplinary action.

Immediate and sustained improvement is required for continued employment and a written coaching session does not alter the at-will status of the employee-employer relationship. Element's culture is one in which employees are expected to work towards mastery when given autonomy and having a sense of purpose. If you have a reasonable request for support to better carry out your role, it is your responsibility to communicate that need to your supervisor or to the Director of Human Resources. Written coaching sessions are not a prerequisite or requirement before termination.

Documentation

All employees are required to upload or update in the payroll system the following documents before or upon expiration:

1. Credential or license (certificated/licensed staff)
2. CPR/AED/First Aid Certification
 - a. approved by AHA or Red Cross with hands-on practicum
 - b. valid for 2 years

- c. any training must be completed during non-working hours or with the use of an approved PTO request
- 3. TB test or TB risk assessment questionnaire
 - a. valid for 4 years
 - b. must be assessed with 6-months of hire
- 4. Change of address, phone number, or personal email address

MANAGEMENT

Open Door Communication

In any employee-to-employee or employee-to-employer relationship, problems may develop. Generally, satisfactory solutions to any problems employees may encounter are not found in discussing such problems with fellow employees or other members of the staff. Rather, they are resolved most effectively by candid discussion between the people with the problem or through informal discussions with Supervisors, School Directors, or the Director of Human Resources. When that kind of discussion is not successful, alternative methods should be used and Element has developed a grievance procedure to resolve complaints and problems.

Grievance Procedure

To resolve differences as quickly and as informally as possible, employees shall attempt to resolve problems through informal discussion with their immediate supervisor or School Director. "Grievance" is limited to a complaint or request of an employee, which involves the interpretation or application of, or compliance with, the provisions of the personnel policies.

The purpose of the grievance policy is (1) to provide an opportunity for discussion of any request or complaint and (2) to establish procedures for the processing and settlement of grievances as defined. Employees are entitled to a grievance procedure to protect their individual rights. All grievances will be fairly heard. An employee is required to follow a 3-step reporting system beginning with the School Director, then the Executive Director, and lastly with the Governing Board of Directors.

The complete grievance policy and procedure for initiating a grievance can be found in Element's internal staff website. Alternative procedures exist for use (1) when the issue is a perceived instance of sexual harassment or harassment that is contrary to law or the stated policies of Element or (2) when the issue involves a safety hazard or a violation of the organization's code of conduct or ethics. These other policies are described elsewhere in the manual and may prove suitable for specific types of issues they govern.

Personnel Records

Employees have a right to inspect or receive a copy of their personnel records that Element maintains, including performance documents or written coaching session documents. Certain documents may be excluded from a personnel file by law and there are legal limitations on the number of requests that can

be made. Each employee's personnel file will contain only such information as needed by Element in conducting its business or as required by Federal, State, or local law.

Personnel files are the property of Element and access to the information they contain is restricted. Access to the personnel files is on a need-to-know basis. Only the following individuals will have absolute access to inspect personnel records: the Executive Director, the School Director, the Director of Human Resources, or designee in their normal performance of duties. All personnel files are kept for a period of four (4) years after separation from employment or as required by law, whichever is greater.

Employees may review their personnel file, using the following guidelines:

1. With reasonable advance notice (5-10 working days), an employee may review material in his/her personnel file in the office of the Director of Human Resources.
2. Only current employees or those on leave of absence may review their personnel files.
3. Review of an employee's personnel file must be made in the presence of the Director of Human Resources or designee. The personnel file cannot be removed from the Director of Human Resources' office; however, the employee may request copies of the documents that have been signed by the employee. A reasonable fee may be charged for any copies made.
4. Material cannot be removed or changed by the employee or supervisor. Only the Director of Human Resources can make any removals or changes.

Employees may request a copy of their personnel file, using the following guidelines:

1. Requests must be made in writing to the Director of Human Resources.
2. Copies will be provided within 30 days from the date the request is received.
3. Employees may either pick up the copy from the Administrative Office or have it mailed to them.

Any change in name, home address, telephone number, marital status, dependent status, or family status should be immediately updated in the payroll system. Employees should also notify their immediate supervisor of any change in name, home address, or telephone number.

Enrollment of Children of Credentialed Staff

Placement of students on rosters is up to the discretion of the School Director, in collaboration with the Regional Manager. In the event a child (grade K-8) of a credentialed staff member is receiving adequate academic support and demonstrating adequate academic support, the student may be placed on the roster of the parent staff member.

However, in the event the child of the credentialed staff person possesses a 504 or IEP, the child will be placed on the roster of another credentialed staff person. As is the case with all students, the parent may request a specific Educational Facilitator, but placement remains up to the discretion of school personnel.

All children of credentialed staff in grades 9-12 shall be enrolled with a credentialed teacher other than the parent staff member.

COMPANY PROPERTY

Organization Materials

All Element literature and Internet home page files and contents are copyrighted and may not be duplicated in any form without the express prior written consent of Element. This restriction includes, but is not limited to, photocopies, graphic reproductions, and translated verbiage.

Computer Software (Unauthorized Copying)

Element does not condone the illegal duplication of software. The law protects the exclusive rights of the copyright holder and does not give users the right to copy software unless the manufacturer does not provide a backup copy. Unauthorized duplication of software is a Federal crime. Penalties include fines of as much as \$250,000 and jail terms of up to five years.

Element licenses the use of computer software from a variety of outside companies. It does not own this software or its related documentation and, unless authorized by the software manufacturer, does not have the right to reproduce it.

If an employee learns of any misuse of the software or related documentation within the organization, they must notify Element's Executive Director immediately.

According to the U.S. Copyright Law, illegal reproduction of software can be subject to civil damages and criminal penalties, including fines and imprisonment. Employees who make, acquire, or use unauthorized copies of computer software shall be disciplined as appropriate under the circumstances. Such discipline may include dismissal.

Proprietary Information

An employee must promptly disclose to Element all inventions, discoveries, or improvements conceived or developed solely or jointly by the employee during their term of employment that:

1. Relate to the business or the actual or anticipated research or development of Element; or
2. Results from any work performed by the employee for Element; or
3. For which equipment, supplies, facilities, or confidential information of Element was used (collectively "Proprietary Information").

The sole exception is that the obligation to assign does not apply to an invention or process that the employee can prove was developed entirely on his or her own time without using any of Element's equipment, confidential information, supplies, trade secret information, or facilities. Element agrees that the employee shall retain all rights, title, and interest to any information, inventions, discoveries, or improvements conceived or developed solely by the employee prior to employment. The employee will identify in writing any such information, inventions, discoveries, or improvements to Element as a prerequisite to protecting the employee's rights. Subject to this paragraph, the employee agrees to assign

to Element all rights, title, and interest to any such proprietary information.

COMMUNICATION

Communication Devices

All Element business should be conducted on Element's computers and technology and through the Element network. All Element work product is the property of Element and must be synced to Element's One Drive Cloud. All employees should take precautions so as not to transmit a virus through the networks. Communication to and from staff, students, or vendors should not be used for commercial ventures, religious or political causes, outside organizations, or other non-employment related solicitations. All communications should pertain to Element business only.

The electronic mail system should not be used to create any offensive or disruptive messages. This includes, but is not limited to, transmission of sexually explicit messages, images or cartoons, racial slurs, and gender-specific comments or any other comments that may be construed as harassment, sexual harassment or disparagement of others based on their age, ancestry, color, religion, religious creed, marital status, medical conditions, genetic information, military and veteran status, national origin, race, sex, gender, gender identity and gender expression, sexual orientation, transgender status, or any other basis prohibited by federal or applicable state or local law. The organization-issued email address provided to each employee is to be used for all professional business purposes only. Personal email addresses are not to be used for work-related purposes, including registration for digital resources, memberships, and subscriptions.

Employees who have not been provided with a work/office space are required to have high speed internet, a dedicated fax or scanner, a business phone line, printer/copier, and email service to communicate with other staff members as well as students and vendors. A stipend will be provided to cover expenses incurred as a result of being required to work remotely including supplies, internet, and phone use.

Work Phone or Work Number

Employee work numbers and/or learning center numbers have been added to the payroll system as a Secondary Number. This will be used to populate the school directory.

If provided with a work phone or a work number, you are required to use such phone and number for all work purposes including, but not limited to, calling and texting.

If you are not provided with a work phone or work number, the learning center number or Teams shall be used to communicate with families and staff.

No personal phone numbers shall be used to communicate with families, vendors, or staff regarding work.

Personal phone numbers may be used to contact an employee for internal work reasons by leadership, when not reachable via a work number.

Employees are encouraged to call via Teams when feasible.

Technology Use

Any technology borrowed from the Organization must be borrowed using the Technology Checkout Form and is subject to the following:

1. The device is to be used for the accomplishment of work-related assignments. Use of the device for personal entertainment is not allowed and may result in the loss of use of the device.
2. No personal data may be synced to the device, including but not limited to, iTunes or social media accounts. Any violation of these terms may result in the loss of the device and technology privileges.
3. The App Store will be locked, unless otherwise authorized. The device is preloaded with all necessary applications and software. Any additional apps or software required to complete assigned work-related assignments will be installed on a case-by-case basis. Contact the Technology Department at techdepartment@myelement.org.
4. All devices must be returned by the date specified or upon the day of separation.
5. The device and any accessories must be returned in clean working condition. If they are not, the employee will be held financially responsible for any and all accidental or intentional non-warranty repair or replacement of damaged, lost, or stolen items.
6. Any mechanical issues with the device (hardware, camera, keyboard, touchpad, screen, charger, or battery) will be repaired by Element's Technology Department only. An employee will not try to internally open the device or fix the issue themselves.

Internet and E-mail Use

Unauthorized use of the Element's internet and equipment for purposes other than Element business is prohibited.

Users are prohibited from:

- Sending or threatening to send a sufficient number of electronic mail ("email") messages to another person to overload, interfere with, or cripple his/her email system (including but not limited to "email bombs"),
- Accessing another person's email box, intercepting another person's email message(s), and/or reading, repositioning or destroying email messages which are addressed to or otherwise intended for another individual,

- Using another person's email address,
- Creating, receiving, uploading, downloading and/or transmitting inappropriate material including, but is not limited to, that of a lewd, lascivious, pornographic, racist, sexist, threatening, or violent subject matter, and
- Using the internet for illegal or unlawful purposes.

Unauthorized use of the internet and equipment for purposes other than Element business is prohibited. Element assumes no liability for direct and/or indirect damages arising from the user's use of Element's email system and services. Users are solely responsible for the content they disseminate. Element is not responsible for any third-party claim, demand, or damage arising out of use the Element's email systems or services.

All users (1) are expected to take precautions so as not to transmit a virus through the networks, (2) should not share passwords since they are confidential, and (3) should not use a code, access a file, or retrieve any stored information unless authorized to do so.

The confidentiality of any message should not be assumed. Element may monitor any Internet activity occurring on Element equipment or accounts. Element currently employs filtering software to limit access to sites on the Internet. If the organization discovers activities which do not comply with applicable law or organizational policy, records retrieved may be used to document the wrongful content in accordance with due process. An Internet user who violates the rules set forth in this policy may be subject to disciplinary action including, but not limited to, suspension, expulsion, and federal penalties associated with internet use.

All stored work-related data including, but not limited to emails, Microsoft OneDrive, or other Microsoft platforms, will be retained for a period of three (3) years from the date of user separation. After three years, data may be subject to deletion or archival as deemed necessary by Element. Stored work-related data is accessible to authorized personnel at any time. Access may be granted for operational, compliance, or security purposes. Element employees are required to ensure that all data within these platforms adheres to Element guidelines and do not compromise sensitive information.

General Etiquette

Employees are encouraged to use face-to-face, phone, or teams calls for communication whenever possible. When necessary to use email, it is expected that the message will **not**:

- Be wordy, but it will be short and to the point;
- Insult an Element Stakeholder; and/or
- Be sent to anyone who does not need to see it.

Work Phone or Work Number

Employee work numbers and/or learning center numbers have been added to the payroll system as a Secondary number. This will be used to populate the school directory.

If provided with a work phone or a work number, you are required to use such phone and number for all

work purposes including, but not limited to, calling and texting.

If you are not provided with a work phone or work number, the learning center number or Teams shall be used to communicate with families and staff.

No personal phone numbers shall be used to communicate with families, vendors, or staff regarding work. Personal phone numbers may be used to contact an employee for internal work reasons by leadership when not reachable via a work number.

Employees are encouraged to call via Teams when feasible.

Recorded Messages

All Element employees must use an out of office message if unable to return any email correspondence or telephone communication

Email

Email messages must identify the employee as an employee of Element, start and end date of leave, and when replies to messages will be sent. Below is a SAMPLE email message:

Hello,

Thank you for your message. I am currently out of the office with limited access to email and will return on [Date of Return]. If your matter is urgent, please contact [Alternate Contact Name] at [Their Email or Phone Number]. Otherwise, I will respond to your message as soon as possible upon my return.

Voicemail

Recorded messages must identify the employee as an employee of Element and be recorded in a professional manner. It must not include any religious content. Below is a SAMPLE voicemail greeting:

“You have reached Edward E. Eff, a staff member for Element Education. I am unable to take your call. Please leave a message and it will be returned promptly.”

Employees provided with an Element phone (in office or cell phone) and Dimensions Collaborative certificated employees must use the sample voicemail greeting.

EMPLOYEE CONDUCT

All employees of Element are expected to act in a mature, professional, and responsible manner at all times. Employees must practice honesty and integrity in fulfilling their responsibilities and comply with all laws and regulations. Occurrences of unacceptable behavior, as well as violations of any rules or policies,

may be subject to disciplinary action, including possible immediate dismissal. Notwithstanding, all employees remain employed “at will” and may be employed or discharged at any time for any reason by the Executive Director or designee.

The Organization encourages its employees to disclose improper activities and to address complaints of interference, reprisal, retaliation, threats, coercion, or intimidation against those who disclose improper activities. Employees have the right to file complaints, while acting in good faith and without fear of retaliation, that they believe are reasonable evidences of a violation of a law, rule or regulation; gross mismanagement; gross waste of funds; an abuse of authority; or a substantial and specific danger to public health or safety. Such reports will be kept confidential to the extent possible.

Element has an open door policy and encourages employees to share their questions, concerns, suggestions, or complaints with someone who can address them properly. In most cases, a School Director or Regional Manager is in the best position to address an area of concern. However, if you are not comfortable speaking with or are not satisfied with your School Director’s or Regional Manager’s response, you are encouraged to speak with the Executive Director. Administrative staff and Leadership are required to report suspected violations to the Executive Director, who has specific and exclusive responsibility to investigate all reported violations. For suspected fraud, or when you are not satisfied or uncomfortable with following Element’s open door policy, individuals should contact the Governing Board President.

Rules of Conduct

All employees must adhere to Element’s rules of conduct. Claims of ignorance, good intentions, or bad advice will not be accepted as excuses or reasons for noncompliance.

Rules of conduct include, but are not limited to:

1. Display good judgment and high ethical standards in business dealings;
2. Do not break the law;
3. Keep honest and accurate financial records;
4. Use company property for business only;
5. Conduct personal business to avoid conflicts of interest;
6. Do not use confidential information for personal gain;
7. Do not use funds for improper or illegal activities; and
8. Forward requests from federal, state, and municipal government agencies to the Director of Human Resources.

The success of Element depends upon the quality of the relationships between Element, our employees, our students, our parents, our vendors, and the general public. Our stakeholder’s impression of Element and their interest and willingness to work with us is greatly influenced by the people who serve them. Employees are ambassadors of Element. The more goodwill employees promote, the more our clients will respect and appreciate our employees, Element, and its products and services.

There are several things employees can do to give the public a good impression of Element:

1. Act competently and deal with clients in a courteous and respectful manner;

2. Communicate pleasantly and respectfully with other employees at all times;
3. Follow up on orders and questions promptly, provide businesslike replies to inquiries and requests, and perform all duties in an orderly manner; and
4. Do not guess or assume answers; if an employee is unsure, they should ask the Executive Director.

Unacceptable Activities

It is expected that each person acts in a mature, professional, and responsible manner at all times. The complete list of unacceptable activities can be found in the Disciplinary Process Policy which is available on Element's internal staff website. Occurrences of unacceptable behavior, as well as violations of any rules or policies, may be subject to disciplinary action, including possible immediate dismissal. It is the employee's responsibility to become familiar with the Disciplinary Process policy, the list of unacceptable activities, and the result if an unacceptable behavior occurs.

If employees have any questions concerning any work or safety rule, or any of the unacceptable activities, they should see the Executive Director for an explanation.

Confidentiality

All employees will, to the best of their ability, ensure confidentiality and privacy regarding history, records, and discussions about the students served by Element as well as any stakeholders. Employees shall not disclose any information about a person or student, including the fact that the person is or is not served by Element, to anyone outside of Element, unless authorized by the Executive Director, Governing Board, or other authorized personnel. The principle of confidentiality must be maintained in all programs, sites, functions, and activities. Due to its seriousness, disclosure of confidential information could lead to dismissal. Employees are encouraged to refer all questions from outside parties to the Executive Director.

Employees will have access to and knowledge of confidential information that is essential to the performance of their duties. In consideration of an employee's access to this confidential information, employees will not, for a period of two (2) years after termination of employment:

- disclose any confidential information to any person or entity, or
- make use of any confidential information for their own purposes or for the benefit of any other person or entity, other than Element.

Additionally, the employee will **never** use or disclose confidential information pertaining to an individual student or parent without the express written consent of both the parent and/or student as well as the express written consent of Element. Any questions regarding confidential issues either from an employee or an outside party should be referred directly to the Executive Director.

The employee shall become familiar with the complete Confidentiality policy which can be found on Element's internal website.

Conflict of Interest

All employees must avoid situations involving actual conflict of interest. Personal or romantic involvement

with any stakeholder of Element, which impairs an employee's ability to exercise good judgment on behalf of Element, can create an actual conflict of interest.

Supervisor-subordinate romantic or personal relationships also can lead to supervisory problems, possible claims of sexual harassment, and morale problems.

An employee involved in any of the types of relationships or situations described herein should immediately and fully disclose the relevant circumstances to his or her immediate supervisor, or any other appropriate supervisor, for a determination about whether an actual conflict exists. If an actual conflict is determined, Element may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts shall constitute grounds for disciplinary action.

Outside Employment

Although employees are bound by the provisions regarding non-competition and confidentiality as set forth in this employment manual, employees may engage in outside business activities that do not violate the terms of this employment manual.

An employee may only serve as an Independent Contractor for Element on days outside his/her regular Employment Agreement and with prior approval by the Executive Director.

Solicitation and Distribution

Employees may not solicit from, or distribute to parents, students, vendors, or other employees any non-organization literature or media.

Sexual Harassment

It is the position of Element that sexual harassment is unlawful and will not be tolerated. It is a violation of Element's Sexual Harassment Policy for any employee, student, parent, or vendor to engage in sexual harassment.

"Sexual harassment" means unwelcome sexual advances, requests for sexual favors, and other verbal, visual, or physical conduct of a sexual nature, made by someone from or in the work or educational setting, under the following conditions:

1. Submission to the conduct is explicitly or implicitly made a term or condition of an individual's employment, academic status, or progress;
2. Submission to, or rejection of, the conduct by an individual is used as the basis of employment or academic decisions affecting the individual;
3. The conduct has the purpose or the effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment; and/or
4. Submission to, or rejection of, the conduct by an individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

(Education Code §212.5)

Sexual harassment does not need to be motivated by sexual desire to be unlawful or to violate this policy. For example, hostile acts toward an employee because of his/her gender can amount to sexual harassment, regardless of whether the treatment is motivated by any sexual desire.

Specifically, sexual harassment may occur as a pattern of degrading sexual speech or actions ranging from verbal or physical annoyances or distractions to deliberate intimidations and frank threats or sexual demands. Employees are prohibited from harassing other employees or students whether or not the incidents occur on Element's premises or during working hours. Examples of conduct considered to be sexual harassment and procedures for reporting are listed in the Sexual Harassment policy, which can be found on Element's internal website.

Any expression of sexual interest between adults and students, regardless of reciprocity, is considered inappropriate and shall be subject to discipline. (Education Code section 44932)

Reporting Procedures

Any employee who believes he or she has been sexually harassed by an employee, agent, or student of Element should promptly report the facts of the alleged incident(s) and the name of the individual involved to any adult staff member with whom they feel comfortable. That person shall then report the incident to their supervisor, Director of Human Resources, or Executive Director. The employee who has knowledge of an allegation of sexual harassment is required to report to their supervisor, Director of Human Resources, or Executive Director as soon as possible.

Element will immediately undertake an effective, thorough, and objective investigation of the allegations and advise all concerned parties of the results. All information pertaining to a sexual harassment complaint or investigation shall be kept confidential to the extent reasonably possible. Element will not retaliate against an employee for filing a complaint and will not tolerate or permit retaliation by management, employees, or coworkers. All information pertaining the complaint or investigation shall be kept confidential to the extent reasonably possible. Element will not retaliate against an employee for filing a complaint and will not tolerate or permit retaliation by management, employees, or coworkers.

If determined that sexual harassment has occurred, then effective remedial action will be taken in accordance with the circumstances involved. Any employee determined by Element to be responsible for sexual harassment will be subject to appropriate disciplinary action, up to and including, termination.

Element provides annual training to all employees and it encourages all employees to report any incidents of sexual harassment immediately so that complaints can be quickly and fairly resolved

Student / Employee Interaction

All employees must conduct themselves in a way that reflects the high standards of behavior and professionalism required of employees in an educational setting. It is each employee's obligation to avoid situations that could prompt suspicion of inappropriate student / employee interaction. Employees must understand their own responsibilities for ensuring that they do not cross any

boundaries. Employees are encouraged to discuss issues with the School Director or the Director of Human Resources whenever they are unsure whether a particular conduct may constitute a violation. Examples of inappropriate and appropriate interaction can be found in the Student/Employee Interaction policy on Element's internal website.

When any employee, parent, or student believes an employee may have crossed the boundaries, he or she must promptly report the suspicion to the School Director, Director of Human Resources, or designee. 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. All reports shall be confidential.

In the event that a student initiates inappropriate behavior toward an employee, the employee must document the incident and report it to the School Director, or designee. If appropriate, the School Director will intervene and speak with the student and the student's parent/guardian about the alleged inappropriate behavior.

The School Director, or designee, will promptly investigate and document the investigation of any allegation of sexual misconduct. Through this fact-finding process, all privy to the investigation shall protect the privacy interests of any affected student(s) and/or employee(s), including any potential witnesses, as much as possible.

Disciplinary Action

Employees who have violated this policy will be subject to appropriate disciplinary action, up to and including dismissal, and where appropriate, reported to authorities for potential legal action. Consistent with the California Department of Education Guidelines, Element will disclose to educational institutions seeking references any formal reprimands or dismissals for violating this Policy.

Substance Use and Abuse

Element is committed to providing its employees with a safe work environment. Employees are expected to be in suitable mental and physical condition while at work or representing Element, allowing employees to perform their jobs effectively and safely.

Whenever use or abuse of any mental, physical, emotional, or behavior-altering substance, such as alcohol or other drugs, interferes with a safe workplace, including the safety of all employees, appropriate action must be taken. Employees are expected to report to work, or represent Element, with no mental, physical, emotional, or behavior-altering substance in their body. The possession, sale, or use of mental, physical, emotional, or behavior-altering substances at the workplace or coming to work under the influence of such substances shall be a violation of safe work practices and will be subject to disciplinary action up to

and including termination of employment.

Nothing in the Drug Free Workplace policy is construed to prohibit Element from its responsibility to maintain a safe and secure work environment for its employees or from invoking such disciplinary actions as may be deemed appropriate for actions of misconduct by virtue of their having arisen out of the use or abuse of alcohol or drugs or both. Employees are required to report to the Director of Human Resources within 5 days of any conviction for a criminal drug law violation.

Theft

Property theft of any type will not be tolerated by Element. Property theft is the unauthorized use of Element services or facilities or the taking of any organization property for personal use. The following non-inclusive list of examples provides illustrations of several unacceptable activities:

1. Use of company copy machines for personal use. The office copiers are not provided as a free service to employees;
2. Element's computers (personal computers in Element's offices or laptops made available for work away from Element's offices) are to be used exclusively for business purposes; and/or
3. Taking of Company Property. No item purchased or supplied by Element should ever be removed from Element premises without express authorization of the Executive Director. This rule applies to all organization property. All employees may be subject to random searches as they leave company facilities. The Executive Director may authorize an employee to borrow company equipment or to take samples of their work home. A checkout procedure will be used and if an employee fails to return any item removed on schedule, then an invoice will be sent for the value of the items with the option of payment being deducted from an employee's paycheck and the employee may be subject to disciplinary action for theft.

Weapons

Element is committed to providing a safe workplace for employees, vendors, and students. Weapons of any sort are forbidden on organization property or while representing Element.

Dress Standards

Element is committed to being a high-performance organization, focused on outstanding student performance, achievement, and preparation for a lifetime of success. Appropriate professional appearance not only reinforces a shared-vision of Element and the employee's identity as highly motivated professionals working toward a common mission and self-worth but also, strengthens the community's attitude toward Element and the teaching profession in general, as well as the conduct, morale, and performance of Element's students.

Employees shall maintain professional standards of dress and grooming that demonstrate their high regard for education, present an image consistent with their job responsibilities and assignment, and do not endanger the health or safety of employees or students. Since Element employees come into frequent contact with the public, employees must exercise good judgment in their choice of professional appearance for work or work-related activities by always appearing in a manner that must:

- Be appropriate to the situation, e.g. at a learning center, when meeting with parents, students, and other professionals, on a field trip, at a graduation, or participating in a running club;
- Invoke a positive impression from the community;
- Provide appropriate role modeling for students;
- Promote a working and learning environment that is free from unnecessary disruption and promotes safety; and
- Be conducive to high student and staff performance.

Employees must be clean, neat in appearance, free of anything that may be a distraction to students, parents or employees, or impair health or safety in the workplace. In general, clean, professional, business/business casual attire is acceptable and appropriate. An employee may be asked to change attire or accessories.

Element shall allow employees to appear and dress in a manner consistent with their gender identity or gender expression.

Element shall not discriminate against employees based on hair texture and protective hairstyles, including, but not limited to, braids, locks, and twists.

Element shall not dismiss an employee, discriminate against an employee in compensation or in terms, conditions, or privileges of employment, or refuse to hire a job applicant on the basis of religious dress or grooming practices.

Given the various work functions of employees, Element reserves the right for the Leadership Team to have the discretion for providing details and managing the dress and grooming of employees. These regulations may be in addition to this written policy. The leadership team is responsible for ensuring compliance with this policy and is expected to counsel employees on professional appearance in conformance with this policy and the related procedures. Any violators of these standards may be subject to appropriate disciplinary action.

See Resources for additional reference – Dress and Grooming Standard for Students

Punctuality and Attendance

Employees are expected to be punctual and regular in attendance. Any tardiness or absence causes problems for fellow employees and supervisors. When you are absent, your assigned work must be performed by others.

Employees are expected to report to work as scheduled, be on time, and be prepared to start work. Late arrival, early departure, or other unanticipated and unapproved absences from scheduled hours are disruptive and must be avoided.

In all cases of absence or tardiness, employees must provide their supervisor with an honest reason or explanation. Employees also must inform their supervisor of the expected duration of any absence.

Page | 49

Refer to the Time Off section of the Employment Manual for the procedure for requesting time off.

If you fail to report for work without any notification to your supervisor and your absence continues for a period of three days, Element will consider that you have voluntarily abandoned or quit your employment.

Absences protected by state and federal law do not count as a violation of the Personal Leave policy.

Absences which are not approved, job protected, or taken without the availability of sufficient amount of PTO may be subject to disciplinary action.

Prohibition of Discrimination, Harassment, Intimidation, and Bullying

Bullying (including cyber-bullying), harassment, discrimination and intimidation in any form are prohibited at school-related activities or outside of school hours with the intention to be carried out during any school-related activity.

Such acts include those that are reasonably considered as being motivated either by an actual or perceived attribute that includes but is not limited to disability, gender, gender identity, gender expression, nationality, race, ethnicity, religion, immigration status, and/or sexual orientation.

Element prohibits the inciting, aiding, coercing, or directing of others to commit acts of bullying or cyber-bullying, discrimination, harassment, or intimidation.

Any form of retaliation in response to a report of such acts is prohibited and the identity of the complainant will remain confidential, as appropriate.

Any Employee who witnesses and/or overhears such actions, or to whom such actions have been reported, must take prompt and appropriate action to stop the behavior and to prevent its recurrence.

COMPENSATION

Element's compensation structure compliments it's budget and business strategies by providing competitive compensation and benefits. All compensation will comply with applicable federal, state, and local laws. All staff are employed by Element and will be carried directly on Element's payroll.

Questions regarding compensation, deductions, or errors in pay may be directed to the Chief Business Officer.

Deductions from Paycheck (Mandatory)

Element is required by law to make certain deductions from employee paychecks each time they are prepared. Among these are federal and state taxes and state disability insurance as required by law.

These deductions will be itemized on the paycheck stub. The amount of the deductions will depend on earnings and on the information furnished on the employee's W-4 form regarding the number of dependents/exemptions claimed. Any change in name, address, marital status, or number of exemptions must be updated in the payroll system. The W-2 form employees receive each year, indicates precisely how much of the employee's earnings were deducted for those purposes.

Any other mandatory deductions to be made from an employee's paycheck, such as court-ordered garnishments, will be explained whenever the organization is ordered to make such deductions.

Paycheck Distribution

The employee's pay stub can be found in the payroll system. Paychecks are electronically deposited directly to the account specified by the employee.

Work Week

The payroll workweek for Element employees begins on Sunday at 12:00 a.m. and ends on Saturday at 11:59 p.m.

Non-exempt employees are expected to work their scheduled work hours Monday through Friday. The work week schedule may not be adjusted or made up on weekends or before/after scheduled work hours.

Pay Cycle

The pay cycle is semi-monthly, from the 1st through the 15th and the 16th through the 31st. Paydays are on the 5th and 20th of the month. When the payday falls on a weekend or legal holiday, the payday will be the last business day prior to the 5th or the 20th.

Error in Pay

Every effort is made to avoid errors in an employee's paycheck. If an employee believes an error has been made, the employee must tell the Chief Business Officer immediately. He or she will take the necessary steps to research the problem and to assure that any necessary correction is made properly and promptly. It is imperative that all documentation regarding learning records and attendance forms be turned in prior to payroll preparation to allow for accurate payroll calculations and compliance with state laws.

Wage Assignments (Garnishments)

Whenever court-ordered deductions are to be taken from an employee's paycheck, the employee will be notified.

Reporting Time Pay – Inclement Weather and “Acts of God”

Employees will not be paid when work is not available due to circumstances not within Element's control, such as:

- Operations cannot commence or continue due to threats to employees or property or when recommended by civil authorities;
- Public utilities fail to supply electricity, water, or gas, or there is a failure in the public utilities, or sewer system; and/or
- An "Act of God" (inclement weather, fire, flood, earthquake, avalanche, etc.) or some other cause not within the organization's control causes the interruption of work.

Payroll System

Element utilizes an employee self-service website provided via an online payroll system. This service allows employees to view pay stubs, request time off, print W2's, etc.

Electronic Timecards and Records

All nonexempt employees are required to use an online timesheet via the payroll system to record time worked for payroll purposes. All time worked must be accurately reported on your time record. Electronic timecards are due at the end of the day for each pay period.

Employees must record their own time at the start and at the end of each work period. Employees must clock out for their meal period and record the start and end of the meal period.

Employees are not allowed to work "off the clock." Employees also must record their time whenever they leave the building for any reason other than Element business.

Employees will be required to certify that their time record is accurate. Any changes on the electronic timecard must be approved by a supervisor. Inputting another employee's time, allowing another employee to input your time, or altering an electronic timecard is not permissible and is subject to disciplinary action.

Any errors on your electronic timecard should be reported immediately to your supervisor.

Meal and Rest Periods

Rest Breaks

All nonexempt employees are entitled to rest break periods during their workday. Nonexempt employees will be paid for all such break periods, and will not clock out. An employee is expected to return to work promptly at the end of any rest breaks.

Number of Rest Breaks

A non-exempt employee will be authorized and permitted one 10-minute rest break for every four hours of work (or major fraction thereof, which is defined as any amount of time over two hours). A rest break need not be authorized for employees whose total daily work time is less than three and one half (3.5) hours.

If an employee works a shift from three and one-half (3.5) to six hours in length, the employee will be

entitled to one 10-minute rest break. If an employee works more than six hours and up to ten hours, the employee will be entitled to two 10-minute rest breaks.

Timing of Rest Breaks

An employee is authorized and permitted to take a rest break in the middle of each four-hour work period. The rest break will be scheduled by the Supervisor.

Meal Period

Non-exempt employees will be provided an uninterrupted meal period of at least 30 minutes if the employee works more than five hours in a workday. The employee must clock out for their meal period before the commencement of the sixth hour of work. The employee will be permitted a reasonable opportunity to take this meal period and will be relieved of all duty. During the meal period, the employee is free to come and go as they please and are free to leave the premises. The employee is expected to return to work promptly at the end of any meal period.

If the total work period for the day is more than five hours per day but no more than six hours, the employee may waive the meal period. This cannot be done without the mutual consent of the employee and the supervisor. The employee must discuss any such waiver with the Director of Human Resources in advance and the waiver must be in writing.

Anytime an employee misses a meal period that was provided, or an employee worked any portion of a provided meal period, the employee will be required to report to their supervisor and document the reason for the missed meal period.

Exempt employees are provided and required to take meal breaks.

Timing of Meal Period

The meal period will be provided no later than the end of an employee's fifth hour of work. For example, if an employee begins work at 8:00 a.m., the meal period must start by 12:59 p.m. (which is before the end of the fifth hour of work). The meal period will be scheduled by the supervisor.

Meal Period Waiver

Only in the limited circumstances can meal periods be waived by mutual consent of the employee and Element. Meal period waivers only apply to employees who will complete their workday within six hours. When meal periods are waived, Employees are required to (1) Complete and sign a meal period waiver form, (2) Have the direct manager or Director sign the form, and (3) Upload the completed form to the payroll system.

If an employee works more than six hours in any workday, then the meal period may not be waived. In order for a meal period waiver to be valid, an EEI Official must authorize the waiver in writing by signing the Meal Period Waiver form. EEI does not encourage, discourage, or solicit the waiver of a meal period.

Business Expense Reimbursements

To receive a reimbursement an expense reimbursement form must be completed, approved by the supervisor, and sent to the Administrative Specialist - Business Services for processing within 45 days. Original receipts, Google map printout showing miles, and other documentation must be attached.

Expense Reimbursement forms can be found on Element's internal website.

Mileage

Mileage will be reimbursed for qualifying employees use of a personal vehicle for Element's business. Mileage reimbursement is for miles incurred above and beyond the employee's normal commute to assigned work location(s). The administrative office is an assigned work location for all employees and mileage to and from this location is not reimbursed.

The expense reimbursement form should be submitted to the Chief Business Officer and indicate points of travel, miles eligible for reimbursement, and include Google Map printout. Greater distance from employee's home to assigned work location, including administrative office, will be deducted in accordance with IRS guidelines. Mileage will be reimbursed at the current IRS approved rate.

Payroll Dates

Twelve-month full-time employees will be paid their base salary in 24 equal installments. Ten-month full-time employees will be paid their base salary in 21 equal installments. Part-time employees will be paid based on the hours worked or students served within the pay periods. Supplemental pay and stipends will be paid based on the pay periods and pay dates. If the 5th or the 20th falls on a weekend or holiday, then the paycheck will be issued on the prior workday.

The Payroll Calendar can be found on Element's internal website.

Compensation Matrices

Element has different compensation matrices dependent on an employee's position: (1) Administrative and (2) Certificated. The Compensation Matrices can be found on Element's internal website.

SAFETY AND HEALTH

Distracted Driving

Distracted driving is the diversion of attention from driving, as a result of the driver focusing on a non-driving object, activity, event, or person. This diversion reduces cognitive awareness, decision-making, or performance leading to increased risk of driver-error, near-crashes, or crashes.

Employees are to operate vehicles in a safe manner and shall not engage in Distracted Driving practices while carrying out employment duties such as, but not limited to:

- Operating a cellphone (hand-held),

- Operating a computer / laptop, text messaging device, or Global Positioning System (GPS) tools and devices,
- Reading (a book or newspaper, etc.), or
- Personal grooming

This applies to all employees when **any** of the following conditions apply:

- Operating an Element vehicle or ride-on lawn mower
- Operating a personal vehicle while during working hours, for Element's purposes, or as part of the employee's job duties
- Driving on Element's property
- Driving while using a cell phone supplied by Element
- Driving while using a personal phone for Element's business

Regardless of the circumstances, including slow or stopped traffic, employees are required to use hands-free operations or pull off to the side of the road or another safe location and safely stop the vehicle before placing or accepting a call and reading or responding to emails, instant messages, tweets, or text messages. Special care should be taken in situations where there is traffic or inclement weather, or the employee is driving in an unfamiliar area.

All employees are expected to follow applicable local, state, and federal laws and regulations regarding holding a valid driver's license, registration, insurance, and following rules on the use of cellphones at all times. Employees who are charged with traffic violations resulting from the use of their phone while driving will be solely responsible for all liabilities that result from such actions.

Employees using an Element-owned vehicle will be enrolled with the DMV Employer Pull Notice Program and must obtain a DMV clearance. Employees who use Element-owned vehicles or ride-on lawn mowers must complete required safety training.

The employee must immediately report all accidents, fines, and traffic violations, which occur while carrying out job responsibilities, to the Executive Director within 48 hours.

Employees failing to comply will be subject to discipline, up to and including termination of employment.

Ergonomics

Element abides by the Cal/OSHA ergonomics standards for minimizing workplace repetitive motion injuries. Element will make necessary adjustments to reduce exposure to ergonomic hazards through modifications to equipment, processes, and employee training. Element encourages safe and proper work procedures and requires all employees to follow safety instructions and guidelines. Element believes that reduction of ergonomic risk is instrumental in maintaining an environment of personal safety and well-being and is essential to our business. Element intends to provide appropriate resources to create a risk-free environment. Any questions about ergonomics are to be directed to the Director of Human Resources.

Health and Safety

All employees are responsible for their own safety, as well as that of others in the workplace. To help Element maintain a safe workplace, everyone must be safety-conscious at all times. Report all work-related injuries or illnesses immediately to the supervisor and to the Director of Human Resources. In compliance with California law and to promote the concept of a safe workplace, Element maintains a variety of safety-related plans, including the Comprehensive Safety Plan. The plans are available for review by employees and/or employee representatives in the Director of Human Resources' office as well as on Element's internal website.

Tuberculosis (TB) Tests

All employees are required to be free of infectious tuberculosis (TB). A TB test or a TB Risk Assessment Questionnaire must be provided to the Director of Human Resources upon hire and every 4 years based on the date of the test/questionnaire.

Hepatitis B

Hepatitis B vaccinations are encouraged and provided at no cost to all employees. All employees are required to complete the Hepatitis B Vaccination Form and submit it to the Director of Human Resources.

Workplace Violence

Element has adopted the Violence in the Workplace policy to ensure a safe working environment for all employees. Element takes the safety and security of its employees seriously. Element does not tolerate acts of physical violence, including but not limited to, intimidation, harassment, coercion, discrimination, and/or retaliation. It is the responsibility of the employee to immediately report any act or threat of violence to the Director of Human Resources. Any reports of this type will be treated seriously and investigated promptly and impartially. Any employee found in violation of this policy will be disciplined, up to and including immediate termination.

Workplace violence is defined as: Any violence against employees, that takes place within the workplace, is committed by persons who have an employment related connection with the organization, or are outsiders, and involves:

1. Physical acts against person or employer property;
2. Verbal threats or vicious statements that are meant to harm or cause a hostile environment;
3. Written threats or other written conduct of intense distortion that is meant to threaten or create a hostile environment;
4. Visual acts that are threatening or intended to convey injury or hostility; and/or
5. Abusive misconduct, including bullying.

Lactation Accommodation

Element provides a reasonable amount of break time to accommodate an employee's need to express breast milk for the employee's infant child. An employee may request an accommodation for lactation breaks by submitting a lactation accommodation request form to the Director of Human Resources.

The requested break time should, if possible, be taken concurrently with other scheduled break periods. Nonexempt employees must clock out for any lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.

Element reserves the right to deny, in writing, an employee's request for a lactation break if the additional break time will seriously disrupt operations.

COVID-19

Element Education's response to COVID-19 is designed to sustain our important mission of promoting a culture of education while maintaining the health and safety of our staff and students. COVID-19 response and operations plans can be found on the Element staff portal. Element will act in accordance with all applicable public health directives and SDCOE's guidance. Federal, state, county, and local health and education directives will be monitored and followed.

Additionally, Element provides reasonable accommodations due to COVID-19 to qualified employees. It is the employee's responsibility to inform the Director of Human Resources of a need for a COVID-19 related accommodation. Reasonable accommodations are determined, identified, and implemented in a collaborative process.

Disabilities and Reasonable Accommodations

A Reasonable accommodation is a modification or an adjustment of a job, employment practice, or work environment that makes it possible for a qualified individual with a disability to perform the essential functions of the job.

Element shall provide equal opportunities and engage in the interactive process with employees who request reasonable accommodations, unless the accommodation would impose an undue hardship for Element.

The employee must submit a written request to the Director of Human Resources and participate in the interactive process.

Requests for reasonable accommodation can be made by employees with disabilities, employees experiencing temporary or work-related disabilities, employees who are victims of domestic violence, sexual assault, and stalking, and employees who are participating in an alcohol and drug rehabilitation program.

TERMINATION

Voluntary Resignation

If an employee anticipates having to resign their position with Element, the employee is encouraged, but not required, to notify the Executive Director, in writing, at least two weeks in advance of the date that they must leave.

Voluntary termination occurs when the employee initiates the separation. The following are examples of voluntary terminations:

1. Written resignation;
2. Failure to return from an approved leave of absence without notifying the organization of the need for additional leave;
3. Absence from three consecutive workdays without notifying the Executive Director; or
4. Retirement.

Employees who voluntarily resign are not eligible for unemployment compensation and the organization will contest all claims.

Involuntary Resignation

Element and its staff members have the right to terminate the employment relationship at any time with or without cause or notice.

At Termination

Upon termination, the Executive Director or designee will meet with the employee regarding the release of the following organization materials:

1. Technology equipment (ex. laptop, power cord, cellphone, hotspot, etc.);
2. Keys to be returned with proper identification on them, if applicable;
3. Cal Card, if applicable
4. Student materials to be returned to the organization in order to facilitate an orderly transition for the staff;
5. All material, including but not limited to, notebooks, books, forms, records, and notes accumulated during employment at the organization; and/or
6. Uniforms, if applicable

The Employee agrees to reimburse Element for the current estimated value of any such materials that are not returned to Element within 15 working days.

All employees will be given their final paycheck on their last day of employment provided they have given at least 72 hours' notice. If less than 72 hours is given, then Element will provide a final paycheck within 72 hours. Accumulated but unused PTO shall be deemed a termination benefit to the employee at the hourly rate existing at the termination date.

Exit Interview

Upon departure the employee may be asked to grant Element the privilege of an exit interview. During

the exit interview, an employee can express themselves freely. It is hoped that this exit interview will help Element and the employee to amicably part ways, as well as provide insights into possible improvements Element can make. All information will be kept strictly confidential and will in no way affect any reference information that the organization may provide another employer about the employee.

Letters of Reference and Employee Verification

The Director of Human Resources is responsible for responding to requests for credit or employment verification. Element will verify:

1. Date of hire;
2. Date of termination; and
3. Last position held.

Salary verifications are not provided. For credit purposes, employees can use previous pay stubs to confirm compensation.

GENERAL EMPLOYMENT

A complete and detailed packet of Element policies as approved by the Governing Board can be found on Element's internal website.

Advertising

Any proposal for use of Element's name, trademarks, and logos must be submitted to the Executive Director in writing for written approval prior to such use. Approval shall be obtained for all advertising or promotional media, including newspaper advertisements, audio or video tapes, posters or flyers, and other such promotional means. The employee will have the sole responsibility for obtaining Element's prior written approval for every advertisement.

Trademarks and Logos

Element's trademarks and logos are Element's property and may not be used in any manner, including the reproduction of literature or advertising and voice mail or email, without prior written consent from Element.

Internal Use of Employee Likeness, Media, and Digital Recordings – Condition of Employment

- Operational Necessity and Security
As a condition of employment, Employees are required to cooperate with Element's administrative photography, identification, and essential digital operational processes. Element will record, maintain, and use the Employee's photograph, name, job title, and digital presence strictly for essential internal operational and security purposes. These purposes include (1) issuing mandatory employee identification and building access badges, (2) maintaining the internal staff directory accessible to Element personnel, and (3) verifying identity for internal IT systems, software access,

and payroll.

- **Recorded Virtual Meetings, Training, and Online Sessions**
To maintain administrative continuity, facilitate remote operations, and provide professional learning and development, Element regularly conducts virtual meetings and training sessions via digital platforms (e.g. Microsoft Teams).
 - **Mandatory Participation:** Employees acknowledge that their voice, image, likeness, and statements may be captured in real-time during these virtual sessions.
 - **Permitted Use of Recordings:** Element may record these sessions for Internal Staff Purposes Only. These recordings will be used solely for administrative review, training employees who were absent, or maintaining operational records.
 - **Security and Access Restrictions:** All recordings will be stored securely on cloud platforms accessible *only* via authorized staff credentials. These recordings will never be shared with parents, students, alumni, or external vendors, nor will they be uploaded to public platforms without Employee consent.

Organization Services

Employees will not publicly advertise on any broadcast or other electronic media system including, but not limited to, radio, television [network or cable] station, internet site or email, bus stops, park benches, or by mass mailing of promotional materials, nor grant interviews to the media regarding Element's business without Element's prior written consent.

The employee may promote his or her services in any legal and ethical manner provided the employee does not use any of Element's names, trademarks, or logos without prior written approval.

To Obtain Students

Employees are not permitted to advertise their services to obtain students. Any public or private advertising for student enrollment will be done through Element.

There are a variety of ways for employees to locate and enroll students into Element's programs. Some resources for locating area groups include:

1. The Internet;
2. The local library/librarian;
3. Community Parks and Recreation Departments; and
4. Local Music / Sports Instructors

An employee can explain the benefits of Element's programs and leave representatives with an approved business card. Once the employee makes contact with a few interested families, they can become a great

market resource.

Business Cards, Stationery, Envelopes, etc.

Employees are provided with a template for business cards, stationery, and envelopes. Customization of these items is limited to employee name, title, address, city, state, zip, telephone, fax, and email information.

Organization stationery can be found in the copy room at the Element's Administrative Office. Requests for business cards can be made to the Executive Assistant.

Email signatures can be found on Element's internal website.

Promotional Items

Promotional items may only be used with the prior written approval from Element and only items from approved sources are authorized.

Activities and Programs

All activities and/or programs organized by or on an Element site need the Element name attached to it and must be approved before publishing.

Annual Notification Of The Uniform Complaint Procedures (UCP)

Element Education, Inc. (EEI) is notifying its' students, employees, parents or guardians of its students, appropriate private school officials or representatives, and other interested of our UCP process.

EEI has the primary responsibility to ensure compliance with applicable state and federal laws and regulations and has established procedures to address allegations of unlawful discrimination, harassment, intimidation, bullying against any protected group, and all programs and activities that are subject to the UCP.

Programs and Activities Subject to the UCP

- Accommodations for Pregnant and Parenting Pupils
- Adult Education
- After School Education and Safety
- Agricultural Career Technical Education
- Career Technical and Technical Education and Career Technical and Technical Training Programs
- Child Care and Development Programs
- Compensatory Education
- Consolidated Categorical Aid Programs
- Course Periods without Educational Content
- Discrimination, harassment, intimidation, or bullying against any protected group as identified under sections 200 and 220 and Section 11135 of the Government Code, including any actual or perceived

characteristic as set forth in Section 422.55 of the Penal Code, or on the basis of a person's association with a person or group with one or more of these actual or perceived characteristics, in any program or activity conducted by an educational institution, as defined in Section 210.3, that is funded directly by, or that receives or benefits from, any state financial assistance.

- Educational and graduation requirements for pupils in foster care, pupils who are homeless, pupils from military families and pupils formerly in Juvenile Court now enrolled in a school district
- Every Student Succeeds Act
- Local Control and Accountability Plans (LCAP)
- Migrant Education
- Physical Education Instructional Minutes
- Pupil Fees
- Reasonable Accommodations to a Lactating Pupil
- Regional Occupational Centers and Programs
- School Plans for Student Achievement
- School Safety Plans
- Schoolsite Councils
- State Preschool
- State Preschool Health and Safety Issues in LEAs Exempt from Licensing
- Any other state or federal educational program the State Superintendent of Public Instruction (SSPI) of the California Department of Education (CDE) or designee deems appropriate.

Filing a UCP Complaint

Complaints alleging discrimination, harassment, intimidation, or bullying must be filed no later than one year from the date the alleged violation occurred or the date the complainant first obtained knowledge of the facts of the alleged act, unless the time for filing is extended by the Compliance Officer, or designee.

A pupil shall not be required to pay a fee for participation in educational activities. A pupil fees complaint may be filed with the School Director, Executive Director, or designee.

For complaints relating to Local Control and Accountability Plans (LCAP), the date of the alleged violation is the date when the reviewing authority approves the LCAP or adopts the annual update.

A pupil fee or LCAP complaint may be filed anonymously if the complainant provides evidence or information leading to evidence to support an allegation of noncompliance.

Responsibilities

EEl shall investigate and seek to resolve these complaints using policies and procedures known as the UCP.

The complainant has a right to appeal EEl's Decision to the California Department of Education (CDE).

Civil law remedies including, but not limited to, injunctions or restraining orders, may be available under state or federal discrimination, harassment, intimidation, or bullying laws, if applicable.

A standardized notice shall be posted, in addition to this annual notice, with educational and graduation requirements for pupils in foster care, pupils who are homeless, pupils from military families and pupils formerly in Juvenile Court now enrolled in a school district.

A copy of the EEI UCP policy and complaint procedures is available free of charge. This notice is available on the School website.

Contact Information

Complaints must be filed in writing with the following compliance officer.

Name of Compliance Officer: Roland Yung
Title of Compliance Officer: Chief Operations Officer
Address: 1441 Montiel Road, Suite 143, Escondido, CA 92026
Telephone Number: 760-743-7880
Email: ryung@myelement.org

EEI shall ensure that the Compliance Officer, or designee, is knowledgeable about the laws and programs to be investigated and shall seek legal counsel or other specialized assistance as needed. Complaints related to pupil fees for participation in educational activities may also be presented to School Director.

Title IX

Element Education ("Element") is committed to maintaining a safe and respectful school environment that is free from discrimination and harassment. Title IX of the Education Amendments of 1972 ("Title IX") prohibits discrimination on the basis of sex, including sexual harassment, in Element's education programs and activities.

DEFINITION OF SEXUAL HARASSMENT

California Education Code §212.5 defines sexual harassment as any unwelcome sexual advances, requests for sexual favors, or other verbal, visual, or physical conduct of a sexual nature made by someone from or in the work or educational setting, under the following conditions:

- Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's employment, academic status, or progress.
- Submission to, or rejection of the conduct by the individual is used as the basis of employment or academic decisions affecting the individual.

- The conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment.
- Submission to, or rejection of, the conduct by the individual is used as the basis for any decisions affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

Sexual harassment under California law may include, but is not limited to:

- Unwelcome verbal conduct such as suggestive, derogatory comments, sexual innuendoes, slurs, or unwanted sexual advances, invitations, or comments; pestering for dates; making threats; or spreading rumors about or rating others as to sexual activity or performance.
- Unwelcome visual conduct such as displays of sexually suggestive objects, pictures, posters, written material, cartoons, or drawings; graffiti of a sexual nature; or use of obscene gestures.
- Unwelcome physical conduct such as unwanted touching, pinching, kissing, patting, hugging, blocking of normal movement, assault; or interference with work or study directed at an individual because of the individual's sex, sexual orientation, or gender.
- Threats and demands or pressure to submit to sexual requests in order to keep a job or academic standing or to avoid other loss, and offers of benefits in return for sexual favors.

Under Education Code section 230, harassment and other discrimination on the basis of sex include, but are not limited to, the following: exclusion of a person or persons from participation in, denial of the benefits of, or subjection to harassment or other discrimination in, any academic, extracurricular, research, occupational training, or other program or activity; and exclusion from participation in, or denial of equivalent opportunity in, athletic programs. The full definition of discrimination and harassment based on sex from Education Code section 230 can be found here:

[http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC§ionNum=230.](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC§ionNum=230)

The definition of sexual harassment under California law and the definition of Sexual Harassment under Title IX overlap in some areas.

- Complaints alleging unlawful discrimination, harassment, intimidation, or bullying based on gender, sex, gender identity or expression, or sexual orientation are eligible to be investigated pursuant to Element's Uniform Complaint Procedures under California law.
- However, if any complaints alleging sexual harassment constitute Sexual Harassment as defined under federal law in Title IX (see below), the complaints shall be investigated under the Title IX Grievance Procedures for Sexual Harassment.

Element prohibits retaliatory behavior against anyone who files a sexual harassment complaint or any participant in the complaint investigation process.

SEX EQUITY IN EDUCATION ACT STATEMENT

Students have all the rights set forth in Education Code section 221.8 (as applicable to Element's programs). This includes the right to:

- Fair and equitable treatment
- A school environment without discrimination on the basis of sex, and
- Be provided with an equitable opportunity to participate in all academic extracurricular activities.

The description of all rights set forth in Education Code section 221.8 can be found here:

[http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC§ionNum=221.8.](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC§ionNum=221.8)

For more information about Gender Equity/Title IX, please visit the following CDE website:

[https://www.cde.ca.gov/re/di/eo/genequitytitleix.asp.](https://www.cde.ca.gov/re/di/eo/genequitytitleix.asp)

RESOURCES

Professional Learning Plan and Record (PLPR) Reference Sheet

At the beginning of each year, employees collaborate with their Director and a mentor or manager to establish focus areas for growth for the current year. As an employee develops each year, the objectives become fewer with goals that may take longer to achieve. Objectives are determined by the employee’s stage of development.

	DEVELOPING	COMPETENT	PROFICIENT	EXPERT
Skill/ Experience	New to organization and learning policies and procedures.	Follows policies and procedures in consistent manner with quality results	Applies niche in daily work to provide specialized support to students and/or colleagues	Uses skills beyond their school for the benefit of the organization
PLPR	Objectives based on job description. Foundational skills of JD	Objectives based on areas identified as high interest, talent, or need	Objectives based on niche rather than JD. Specialize in expertise area and build upon impact or efficiencies Mentoring others	Objectives based on impact Mentoring, training, presentations Beyond organization

In everything we do, whether it be laying out student and professional learning plans, implementing new programs, and even engaging in conversation, we find the best success when we take the time to follow a pattern of identifying our purpose, laying out a plan, and monitoring our practice.

Purpose: What is the *intent*? What are you hoping to achieve with this objective? Why is this something worth doing? What meaning does it have for you? How do you feel about this? Is your mindset in the good place for achieving the objective?

Plan: What is the best way to go about achieving this objective given your intent, skills, and resources? What information/evidence will measure your progress? What does mastery look like?

<p>Lead Mentor/Manager/Director: You will likely have several people with which you collaborate and receive feedback throughout the year. For the names here, which <u>two</u> will sit in as your <u>initial and final</u> collaborators and guides?</p>
<p>Organization wide goals: No need to add anything; this is just a reminder of Element’s goals</p>
<p>Year-end Recommended Goals from Previous Year:</p>

<p>Copy and paste goals from last year’s PLPR to use as reference for determining this year’s goals.</p>
<p>Professional goals for current year: Goals may not be the same as those discussed at end of prior year depending on each person’s current situation.</p> <p>Choose goals which: Tie to your job description Have a purpose and outcome associated with improving student wellness and learning and/or supporting others in doing so (role dependent). Are measurable and achievable</p> <p>Note: “Finishing a master’s thesis” does not necessarily lead to improved student learning. However, implementing a strategy or program learned while studying for the masters may. How will you implement new skills or knowledge that make you more effective, and how will you be sure it is indeed improving your influence on student wellness and learning?</p>
<p>Achievement Level:</p> <p>Starting achievement level should be below a 3 in the goals you select unless you have achieved <i>competent</i> level in all areas of your job description, in which case you may select goals which will support you in moving toward a mentor position.</p> <p>* Not yet introduced:</p> <p>1. Below Expectations: The concept/skill has been introduced but the employee does not have a skill or knowledge set yet or may not recognize a reason to learn it because they don’t consider it a need. (i.e. You do not yet realize the usefulness of riding a bike)..</p> <p>2. Developing The employee understands the importance of learning the skill/knowledge and is developing with assistance (i.e. Recognize riding a bike is fun and can get you where you want to go so learning steps to riding the bike).</p> <p>3. Competent The employee has developed a skill/knowledge and performance is consistently good. (i.e. You can ride a bike on your own with ease).</p> <p>4. Proficient The employee has mastered the skill/knowledge to a point they are able to apply the skill/knowledge elsewhere. The employee can relate to learners in all stages and likely mentor others. (i.e. Able to do tricks, maintain the bike, and/or race the bike, etc.).</p>
<p>Mentors/Resources: Who will be your role model, coach, inspiration? It does not have to be an Element employee. What books, websites, blogs, podcasts, workshops, training modules, conferences. etc. will you turn to for information and guidance?</p>
<p>Objectives: Select from drop down or design personalized one with approval of supervisor. Be clear on why you are choosing this objective and the result you expect to achieve. How is it appropriate for your role?</p>

How many people will it impact?
Evidence: What is being used to determine achievement level?
Employee/Supervisor Comments - Achievement Strategies: We are in a business where our performance is reliant on the performance of others (students and colleagues). It is imperative we have reliable and accurate measures in place for a clear picture of how well our students and staff are intrinsically motivated to achieve better results. List the strategies you intend to use to move toward the desired outcome. Be <u>clear on what the desired outcome will look like and include how you will track and measure progress</u> . This information may change throughout the course of the year.
Employee/Supervisor Comments – Gauging Progress Add comments throughout the year to reflect progress – what is working, what is not. What measures have you used and what are they reflecting? Has new insight or circumstances led to changes to strategies or objectives?
Employee/Supervisor Comments – Final Results Where did you land on the objective? How much have you grown this past year in a way that has made the organization more effective in its service? What more needs to be done?
Employee Profile: (Blue sections) Only required for new hires; recommended for others as easy reference and discussion.
Reviewed Employee, manager, and director confirm document was reviewed and discussed.
Year-end Supervisor only
Signatures Completed at last meeting of the year

Practice: Time is set aside at staff meetings for employees to review and update their plan. What *impact* is your plan having? Does your practice (time, task, technique, and team) align with your plan and purpose? How might you adjust your practice for better results? Do you need to adjust your purpose or plan? Do you have the autonomy and resources you need to get to reach your objective? A formal mid-year discussion with the mentor/manager should be documented on the form. At times, the Director will be included in the mid-year discussion. At the end of the year, all three come together to discuss progress and impact and set goals for the next year.

For the Pro

Once you have achieved **proficiency** in all areas of your role within the organization, it’s time to be a multiplier – someone who makes those around him better. Take time to identify your superpower – what do people come to you for? What brings you joy in your work with others?

As you outline your desired outcomes and strategies to achieve them, consider how you will incorporate your superpower into your areas for growth.

Identify the most essential thing that will improve the performance of those you are expected to influence. What can you do to improve your influence?

Dress and Grooming – Students

Element believes that appropriate dress and grooming contribute to a productive learning environment. Element expects students to wear clothing that is suitable for the school activities in which they participate. Students shall not wear clothing that presents a health or safety hazard or is likely to cause a substantial disruption to the educational program.

When determining specific items of clothing that may be defined as inappropriate, Element shall ensure that the determination is free from bias based on race, ethnicity, national origin, immigration status, gender, sexual orientation, or other protected characteristics. Students shall not be prohibited from dressing in a manner consistent with their gender identity or gender expression or with their religious or cultural observance.

By following this dress code, students will help maintain a respectful and focused learning environment for all members of the school community.

General Guidelines:

1. Appropriateness: Students should dress in a manner that is conducive to a positive learning environment.
2. Modesty: Clothing and accessories should be modest and not distract from the educational process.
3. Safety and Hygiene: Attire should ensure the safety and well-being of all students and staff.

Acceptable Attire	Unacceptable Attire
Tops <ul style="list-style-type: none"> • Shirts with sleeves covering top of shoulders • T-shirts, blouses, and collared shirts. • School-branded or spirit wear 	Tops <ul style="list-style-type: none"> • Tank tops, spaghetti straps, halter tops, or tops with plunging necklines • Midriff-baring shirts or blouses
Bottoms <ul style="list-style-type: none"> • Pants, jeans, and slacks • Clothing that is mid-thigh length or longer • Leggings or tights worn under clothing of appropriate length 	Bottoms <ul style="list-style-type: none"> • Clothing shorter than mid-thigh length • Pants or shorts with holes or excessive rips above mid-thigh • Pajamas (except on designated days)
Footwear <ul style="list-style-type: none"> • Closed-toe shoes • All shoes must have back support or strap 	Footwear <ul style="list-style-type: none"> • Flip-flops or beach sandals • Slippers

	<ul style="list-style-type: none"> • High heels or platform shoes that are unsafe for school activities
<p>Accessories</p> <ul style="list-style-type: none"> • Minimal and non-distracting jewelry • Sunglasses, hoodies, and other head coverings may be worn outdoors but should be removed indoors • Belts, if needed, should be worn appropriately. • Hats and caps may be worn indoors provided there is no touching or sharing of others hats/caps, they cannot be a distraction, and eyes are visible 	<p>Other</p> <ul style="list-style-type: none"> • Clothing that exposes undergarments. • Inappropriately sheer, tight, or short clothing • Clothing, paraphernalia, grooming, jewelry, hair coloring, accessories, body adornments, or personal items that: <ul style="list-style-type: none"> ○ Contain advertisements, symbols, words, slogans, patches, or pictures that are sexually suggestive ○ Promote drugs, tobacco, alcohol, illegal activity ○ Could be considered gang-related ○ Contain obscene, profane, vulgar, lewd, indecent, or plainly offensive text or graphics ○ Could be in any way disruptive or potentially disruptive to the learning environment or that pose a threat or potential threat to the safety or welfare of students or employees

Special Considerations:

1. Physical Education: Students are encouraged to wear athletic clothing appropriate for physical activities, including athletic shorts, T-shirts, and shoes.
2. School Events and Field Trips: Students should dress according to the specific guidelines provided for these events, considering both appropriateness and practicality.
3. Weather Conditions: Students should dress appropriately for weather conditions, including wearing layers and appropriate outerwear.

Enforcement:

The leadership team reserves the right to address any attire deemed inappropriate and may require the student to change if their clothing does not meet the dress code standards. When practical, students shall not be directed to correct a dress code in front of other students.

Students who violate the dress code may face consequences such as being sent home to change,

receiving a warning, or other disciplinary actions as deemed necessary.

The policy may be modified as appropriate to accommodate a student's religious or cultural observance, health condition, or other circumstance deemed necessary.

Element Education Calendar

Element Education, Inc.
2026-2027 Calendar

		Mon	Tues	Wed	Thurs	Fri	Board Meeting 7/24/26			
2026-2027							Office Closed for Summer Break 6/29-7/3			
		27	28	29	30	31	All Staff Return 8/3; Prof. Learning & Mtg Prep 8/3-8/4 (8-4) New Hire Orient. 8/4; Vector Training 8/4; All Staff Kick Off 8/5 Initial Parent Mtgs 8/6-8/7			
MONTH 1 16 days	August/ September	10	11	12	13	14	Initial Parent Mtgs 8/10-8/13 ISC Due 8/14; First Day of School 8/14			
		17	18	19	20	21	CPR Training 8/17; Homeschool Week (CM & DCS) 8/17-8/21 Instructional Prep 8/17-8/21; PD Training 8/19-8/20			
		24	25	26	27	28	CM Lcs Begin 8/24 DCS Offerings Begin 8/31			
		31	1	2	3	4	Labor Day 9/7; Membership/Subscription Deadline 9/11			
MONTH 2 19 days	September / October	7	8	9	10	11	LP 1 Calendars & Attn Due 9/18; Community Learning Drop/Add 9/18			
		14	15	16	17	18	(all Element) 18			
		21	22	23	24	25	CM Student Conferences 9/30-10/2; CM ½ days 9/30-10/1			
		28	29	30	1	2				
MONTH 3 20 days	October	5	6	7	8	9	(Leader Lab) 9			
		12	13	14	15	16	(School) 16			
		19	20	21	22	23	LP 2 Calendars & Attn Due 10/16 High School Drop/Add Deadline 10/23			
		26	27	28	29	30	Fall OPS/VI Ordering Deadline 10/30			
MONTH 4 14 days	November	2	3	4	5	6				
		9	10	11	12	13	(School) 13			
		16	17	18	19	20	Veterans Day 11/11; LP 3 Calendars & Attn Due 11/13			
		23	24	25	26	27	Fall Break 11/23-11/27			
MONTH 5 15 days	December	30	1	2	3	4				
		7	8	9	10	11	Winter iReady Diag 12/7-12/18			
		14	15	16	17	18	LP 4 Calendars & Attn Due 12/18 All Element Winter Meeting & Event 12/18 End of First Semester 12/18; DCS Spring ISC Due MS/HS 12/18			
		21	22	23	24	25	Winter Break 12/21-1/1			
2027		28	29	30	31	1				
MONTH 6 19 days	January	4	5	6	7	8	(Leader Lab) 8			
		11	12	13	14	15	No DCS LC Classes 1/4-1/8; Start of Second Semester 1/4			
		18	19	20	21	22	(All Element) 22			
		25	26	27	28	29	MLK Day 1/18; LP 5 All Records & Attn Due 1/22; Fall Grades Due 1/22			
MONTH 7 14 days	February	1	2	3	4	5				
		8	9	10	11	12	(School) 12			
		15	16	17	18	19	LP 6 Calendars & Attn Due 2/12 Community Learning, Drop/Add 2/12; Non-Instr. Day 2/12			
		22	23	24	25	26	Presidents Week 2/15-2/19			
MONTH 8 19 days	March	1	2	3	4	5	CM ½ days 3/3-3/4; CM Student Conferences 3/3-3/5			
		8	9	10	11	12	(School) 12			
		15	16	17	18	19	LP 7 Calendars & Attn Due 3/12 CM New Family Orientation 3/19			
		22	23	24	25	26	High School Drop/Add Deadline 3/26; Non-Instr. Day 3/26			
MONTH 9 20 days	April	29	30	31	1	2	Spring Break 3/29-4/2			
		5	6	7	8	9	(Leader Lab) 9			
		12	13	14	15	16	(School) 16			
		19	20	21	22	23	Spring OPS/ODP/VI Ordering Deadline 4/15 LP 8 Calendars & Attn Due 4/16			
MONTH 10 19 days	May	26	27	28	29	30				
		3	4	5	6	7				
		10	11	12	13	14	LP 9 Calendars & Attn Due 5/14			
		17	18	19	20	21				
	June	24	25	26	27	28	Sr. Meeting Day 5/26; Last Day of School 5/27 CM Graduation 5/27; DCS Graduation 5/28			
		31	1	2	3	4	Memorial Day 5/31			
		7	8	9	10	11	LP 10 All Records & Attn Due 6/1; Spring Grades Due 6/2 All Staff Year End Event 6/3; Summer Break Begins 6/4			
		14	15	16	17	18	Juneteenth Observed 6/18			
		21	22	23	24	25				
Staff Mtg* 8:30 a-3 p	PL and Prep	Holidays Important Dates	Gov. Board 11:30 a.m.	Renewal Meeting 6 p.m.	LDRSHIP 8:00 a-10:00 a	Assistant Training 8:30-3:30	Advisory Council 11-Noon	Non-Instructional Day	Student Assessments	Initial Parent Meeting Week

Element Admin Meets Weekly on Mondays at 11 a.m. Directors Meet on Mondays at 9:30 a.m.; DCS RM's meet on Monday at 1:30 p.m. Weekly regional meetings of ½ hour to 1 hour TBD by regional teams; *Staff Meeting: Certificated Staff, Instructors, ASOs and Admin. Subject to at-will nature of employment.

Board Approved on 3.27.26

Compensation Matrices

Executive & Administrative Leadership Compensation Matrix FY 2026 - 2027 Approved: May 22, 2026													
Title		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
Executive Director	Salary	\$203,076	\$207,138	\$211,281	\$215,507	\$219,817	\$224,213	\$228,697	\$233,271	\$237,936	\$242,695	\$247,549	\$252,500
CBO/COO	Salary	\$178,708	\$182,282	\$185,928	\$189,647	\$193,440	\$197,309	\$201,255	\$205,280	\$209,386	\$213,574	\$217,845	\$222,202
Director - 12 Months	Salary	\$154,338	\$157,425	\$160,574	\$163,785	\$167,061	\$170,402	\$173,810	\$177,286	\$180,832	\$184,449	\$188,138	\$191,901
Director - 11 Months	Salary	\$141,279	\$144,104	\$146,987	\$149,926	\$152,925	\$155,983	\$159,103	\$162,285	\$165,531	\$168,842	\$172,219	\$175,663

Certificated Compensation Matrix FY 2026-2027 Approved: May 22, 2026													
Title		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
Certificated Manager	Salary	\$85,390	\$87,525	\$89,659	\$91,901	\$94,142	\$96,025	\$97,908	\$99,866	\$101,824	\$103,860	\$105,896	\$107,485
		Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
	Salary	\$109,073	\$110,710	\$112,345	\$114,030	\$115,715	\$117,451	\$119,186	\$120,975	\$122,762	\$124,603	\$126,445	\$128,342
Title		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
Specialized Credential	Salary	\$80,103	\$82,274	\$84,446	\$86,748	\$89,049	\$91,082	\$93,115	\$95,250	\$97,384	\$99,626	\$101,867	\$103,750
		Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
	Salary	\$105,633	\$107,591	\$109,549	\$111,585	\$113,621	\$115,326	\$117,030	\$118,786	\$120,541	\$122,349	\$124,156	\$126,018
Title		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
EF & ED Specialist	Salary	\$60,770	\$62,593	\$64,416	\$66,348	\$68,281	\$70,329	\$72,378	\$74,549	\$76,721	\$79,023	\$81,324	\$83,357
		Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
	Salary	\$85,390	\$87,525	\$89,659	\$91,901	\$94,142	\$96,025	\$97,908	\$99,866	\$101,824	\$103,860	\$105,896	\$107,484
Title		A	B	C	D	E	F						
Stipend Schedule	Annual	\$1,000	\$2,000	\$3,000	\$4,000	\$5,000	\$6,000						
	Hourly	\$34.69	\$34.69	\$34.69	\$34.69	\$34.69	\$34.69						

Stipends and Supplemental Pay:
 Camp Counselor - \$300 per overnight stay
 Home Office/Supply/Mileage stipend is \$100 a month - DCS EF Only
 STSP/PIP Holders salary is \$59,000

Classified Compensation Matrix FY 2026 - 2027 Approved: May 22, 2026													
Title		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
Manager/Executive Assistant	Salary	\$70,967	\$72,924	\$74,881	\$76,941	\$79,001	\$80,598	\$82,194	\$83,842	\$85,490	\$87,190	\$88,889	\$90,228
		Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
		\$91,567	\$92,932	\$94,297	\$95,713	\$97,129	\$98,082	\$99,035	\$100,013	\$100,992	\$101,996	\$103,000	\$104,545
10 Month Classified Specialized	Non-Exempt	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
		\$48,723	\$49,785	\$50,888	\$51,972	\$53,054	\$54,137	\$55,219	\$56,303	\$57,385	\$58,468	\$59,550	\$60,633
		\$29.66	\$30.31	\$30.98	\$31.64	\$32.30	\$32.96	\$33.62	\$34.28	\$34.94	\$35.60	\$36.26	\$36.92
		\$61,716	\$62,799	\$63,882	\$64,964	\$66,047	\$67,130	\$68,213	\$69,295	\$70,378	\$71,460	\$72,543	\$73,631
12 Month Classified	Non-Exempt	\$37.57	\$38.23	\$38.89	\$39.55	\$40.21	\$40.87	\$41.53	\$42.19	\$42.85	\$43.51	\$44.17	\$44.83
		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
		\$48,616	\$49,698	\$50,779	\$51,861	\$52,942	\$54,024	\$55,105	\$56,187	\$57,268	\$58,350	\$59,431	\$60,513
		\$24.93	\$25.49	\$26.04	\$26.60	\$27.15	\$27.70	\$28.26	\$28.81	\$29.37	\$29.92	\$30.48	\$31.03
10 Month Classified	Non-Exempt	\$61,594	\$62,676	\$63,757	\$64,839	\$65,920	\$67,002	\$68,083	\$69,165	\$70,246	\$71,328	\$72,409	\$73,495
		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
		\$40,948	\$41,867	\$42,771	\$43,691	\$44,594	\$45,497	\$46,417	\$47,320	\$48,240	\$49,144	\$50,063	\$50,967
		\$24.93	\$25.49	\$26.04	\$26.60	\$27.15	\$27.70	\$28.26	\$28.81	\$29.37	\$29.92	\$30.48	\$31.03
Maintenance Custodian	Non-Exempt	\$51,887	\$52,790	\$53,710	\$54,613	\$55,533	\$56,436	\$57,340	\$58,259	\$59,163	\$60,083	\$60,986	\$61,906
		Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
		\$31.59	\$32.14	\$32.70	\$33.25	\$33.81	\$34.36	\$34.91	\$35.47	\$36.02	\$36.58	\$37.13	\$37.69
		\$40,376	\$41,458	\$42,539	\$43,621	\$44,702	\$45,784	\$46,865	\$47,947	\$49,028	\$50,110	\$51,191	\$52,273
Administrative Support (hourly) (Finance Asst, LC Asst, teacher aide, etc.)	Non-Exempt	Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
		\$53,354	\$54,436	\$55,517	\$56,599	\$57,680	\$59,332	\$59,843	\$60,925	\$62,006	\$63,088	\$64,169	\$65,132
		\$18.10	\$18.48	\$18.85	\$19.23	\$19.60	\$19.98	\$20.35	\$20.73	\$21.10	\$21.48	\$21.85	\$22.23
Administrative Support (hourly) (Finance Asst, LC Asst, teacher aide, etc.)	Non-Exempt	Step 13	Step 14	Step 15	Step 16	Step 17	Step 18	Step 19	Step 20	Step 21	Step 22	Step 23	Step 24
		\$22.60	\$22.98	\$23.35	\$23.73	\$24.10	\$24.48	\$24.85	\$25.23	\$25.60	\$26.11	\$26.63	\$27.16
		\$22.60	\$22.98	\$23.35	\$23.73	\$24.10	\$24.48	\$24.85	\$25.23	\$25.60	\$26.11	\$26.63	\$27.16

Stipends
 Substitute - Less than 4 hours \$25.00, 4 hours or more \$50.00
 Substitute with CBEST - Less than 4 hours \$37.50, 4 hours or more \$75.00
 Camp Counselor - \$300 per overnight stay



Employee Acknowledgments and Confirmation of Receipt

_____ I have received a copy of Element Education’s 2026-2027 Employment Manual.

_____ I understand and agree that it is my responsibility to read and familiarize myself with Element’s personnel policies and procedures. I am aware and I am able to locate all policies on Element’s internal website.

_____ I understand and agree that nothing in the employment manual creates or is intended to create a promise or representation of continued employment and that employment at Element is **employment at-will**; employment may be terminated at the will of either the organization or myself. My signature certifies that I understand that the foregoing agreement on at-will status is the sole and entire agreement between Element and myself concerning the duration of my employment and the circumstances under which my employment may be terminated. It supersedes all prior agreements, understandings, and representations concerning my employment with Element.

_____ I understand that as a condition of employment with Element, I consent to Element recording and using my image, likeness, voice, or statements for internal purposes.

_____ I understand that, except for the employment at-will status, any and all policies or practices can be changed at any time by Element. Element reserves the right to change my hours, wages, and working conditions at any time. I understand and agree that, other than the Executive Director of Element, no manager, supervisor, or staff member of Element has authority to enter into any agreement, expressed or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will. Only the Executive Director has the authority to make any such agreement and then only in writing, signed by the Executive Director.

Employee's Signature _____

Employee's Printed Name _____

Date _____

Coversheet

Consideration of Proposition 28 Annual Report

Section: XII. Action Items for Community Montessori
Item: A. Consideration of Proposition 28 Annual Report
Purpose: Vote
Submitted by: Doug Miller
Related Material: CM AnnualReport FY25-26.pdf

BACKGROUND:

On November 8, 2022, California voters approved Proposition 28: The Arts and Music in Schools (AMS) Funding Guarantee and Accountability Act. The measure required the state to establish a new, ongoing program supporting arts instruction in schools beginning in 2023–24.

The legislation allocates 1 percent of the kindergarten through grade twelve (K–12) portion of the Proposition 98 funding guarantee provided in the prior fiscal year, excluding funding appropriated for the AMS education program. Local educational agencies (LEAs) with 500 or more students are required to ensure that at least 80 percent of AMS funds to be expended are used to employ certificated or classified employees to provide arts education program instruction. The remaining funds must be used for training, supplies and materials, and arts educational partnership programs, with no more than 1 percent of funds received to be used for an LEA's administrative expenses.

California Education Code (EC) Section 8820(g)(4)—Local Educational Agencies (LEAs) must have this annual report board approved, submitted to the California Department of Education (CDE), and posted to the LEA's website.

Financial Impact:

RECOMMENDATION:

Approve the FY 2025-2026 Proposition 28 Annual Report

Proposition 28: Arts and Music in Schools Funding Annual Report Fiscal Year 2025-26

Name: Community Montessori
 CDS Code: 3710371-0137695
 Charter School Number: 1947
 Allocation Year: 2025-26, 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

Community Montessori has created a new position, Learning and Arts Support Assistant. This person works closely with our Educational Facilitators to ensure that all the arts activities are supplementing and supporting the learning objectives that the Facilitators have. The Learning and Arts Support Assistant assists in creating, coordinating, and implementing arts activities which align with the Montessori philosophy and practices. We have employed 5 people in this role. A wide variety of Art supplies have been purchased.

2. Number of full-time equivalent teachers (certificated).	0.0
3. Number of full-time equivalent personnel (classified).	3.8
4. Number of full-time equivalent teaching aides.	0.0
5. Number of students served.	795
6. Number of school sites providing arts education.	5

Date of Approval by Governing Board/Body 6/26/2026 12:00:00 AM

Annual Report Data URL
<https://www.myelement.org/public-notices>

Submission Date 5/19/2026 11:12:53 AM

Coversheet

Consideration of FY25-26 EPA Resolution

Section: XII. Action Items for Community Montessori
Item: B. Consideration of FY25-26 EPA Resolution
Purpose: Vote
Submitted by: Doug Miller
Related Material: EPA Resolution CM FY25-26.pdf
CM EPA FY25-26.pdf

BACKGROUND:

On November 6, 2012 voters in the State of California approved Proposition 30.

Pursuant to Article XIII, Section 36 of the California Constitution, school districts, county offices of education, and community college districts are required to determine how the moneys received from the Education Protection Account are spent in the school or schools within in jurisdiction, provided that the governing board makes the spending determinations in an open session of a public meeting.

Financial Impact: \$159,802.00

RECOMMENDATION:

Adopt the FY25-26 Education Protection Account resolution

RESOLUTION REGARDING THE EDUCATION PROTECTION ACCOUNT

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

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

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

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

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

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

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

WHEREAS, a community college district, county office of education, school district, or charter school shall have the sole authority to determine how the monies

received from the Education Protection Account are spent in the school or schools within its jurisdiction;

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

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

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

WHEREAS, the annual independent financial and compliance audit required of community college districts, county offices of education, school districts and charter schools shall ascertain and verify whether the funds provided from the Education Protection Account have been properly disbursed and expended as required by Article XIII, Section 36 of the California Constitution;

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

NOW, THEREFORE, IT IS HEREBY RESOLVED:

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

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

DATED: June 26, 2026

Board Member

Board Member

Board Member

Board Member

Board Member

Board Member

ESP-CA
Community Montessori
Income Statement
July 1, 2025 - June 30, 2026

Financial Row	Amount
Ordinary Income/Expense	
Income	
8000 - Revenue	
8010 - Principal Apportionment	
8012 - Education Protection Account Entitlement	\$159,802.00
Total - 8010 - Principal Apportionment	\$159,802.00
Total - 8000 - Revenue	\$159,802.00
Total - Income	\$159,802.00
Gross Profit	\$159,802.00
Expense	
1000 - Certificated Salaries	
1100 - Teachers Salaries	\$159,802.00
Total - 1000 - Certificated Salaries	\$159,802.00
Total - Expense	\$159,802.00
Net Ordinary Income	\$0.00
Net Income	\$0.00

Coversheet

Consideration of the 26-27 Local Control and Accountability Plan (LCAP)

Section: XII. Action Items for Community Montessori
Item: C. Consideration of the 26-27 Local Control and Accountability Plan (LCAP)
Purpose: Vote
Submitted by: Earl Otte
Related Material: CM_26.27_LCAP.pdf

BACKGROUND:

A public hearing was held on May 22, 2026.

Summary: 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. Charter schools are encouraged to follow a process like that required for a school district, which is to hold an initial public hearing to solicit recommendations and comments on the LCAP and annual update, followed by a subsequent public meeting for adoption of the plan, before submitting the adopted LCAP to the charter authorizer.

RECOMMENDATION:

Approve 26-27 Local Control and Accountability Plan (LCAP).-

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Community Montessori

CDS Code: 37103710137695

School Year: 2026-27

LEA contact information:

Earl Otte

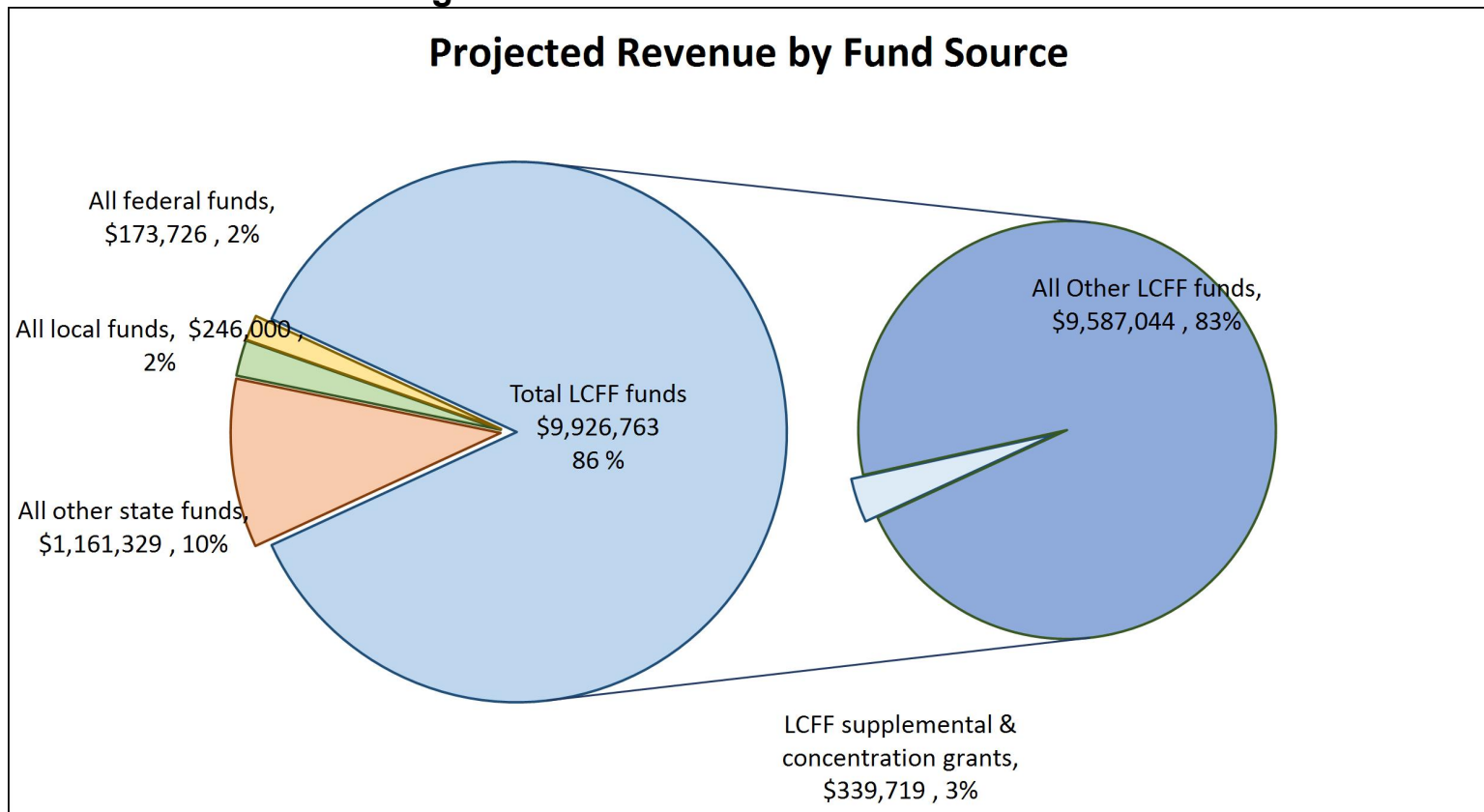
School Director

eotte@cmcharter.org

(760) 445-4907

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 2026-27 School Year

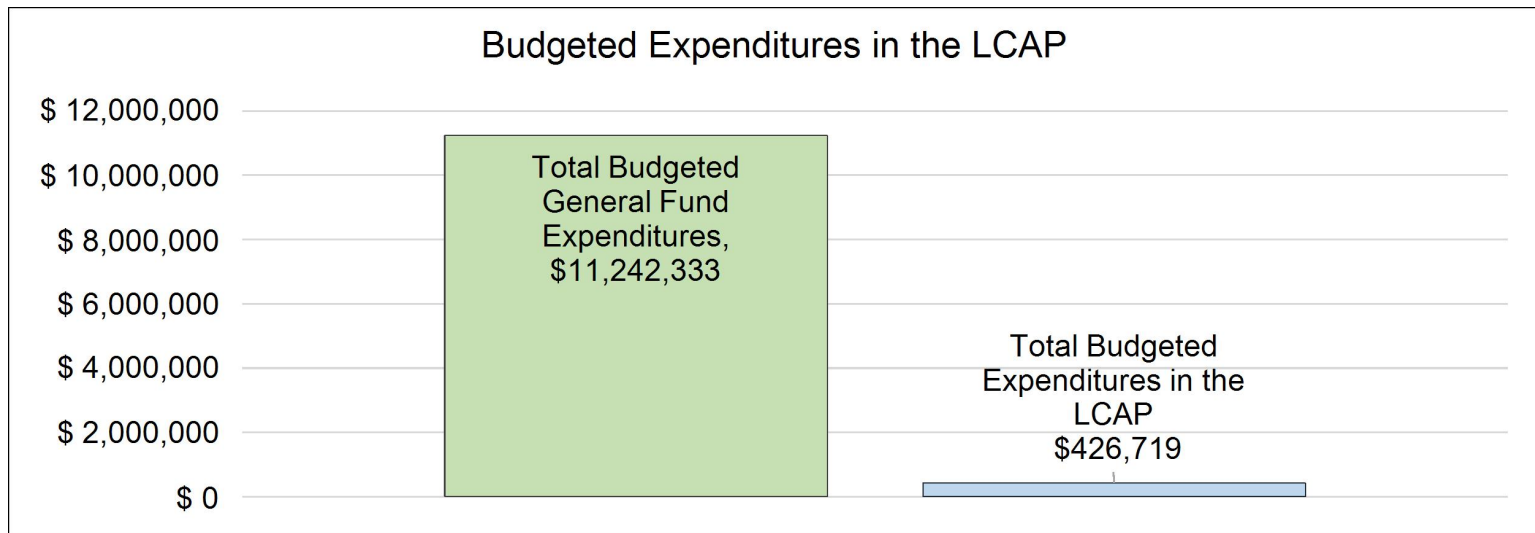


This chart shows the total general purpose revenue Community Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Community Montessori is \$11,507,818, of which \$9,926,763 is Local Control Funding Formula (LCFF), \$1,161,329 is other state funds, \$246,000 is local funds, and \$173,726 is federal funds. Of the \$9,926,763 in LCFF Funds, \$339,719 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 Community Montessori plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Community Montessori plans to spend \$11,242,333 for the 2026-27 school year. Of that amount, \$426,719 is tied to actions/services in the LCAP and \$10,815,614 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Regular operational costs including, wages and salaries, benefits, facility rents, maintenance and upgrades.
Instructional materials, including supplies, curriculum and technology

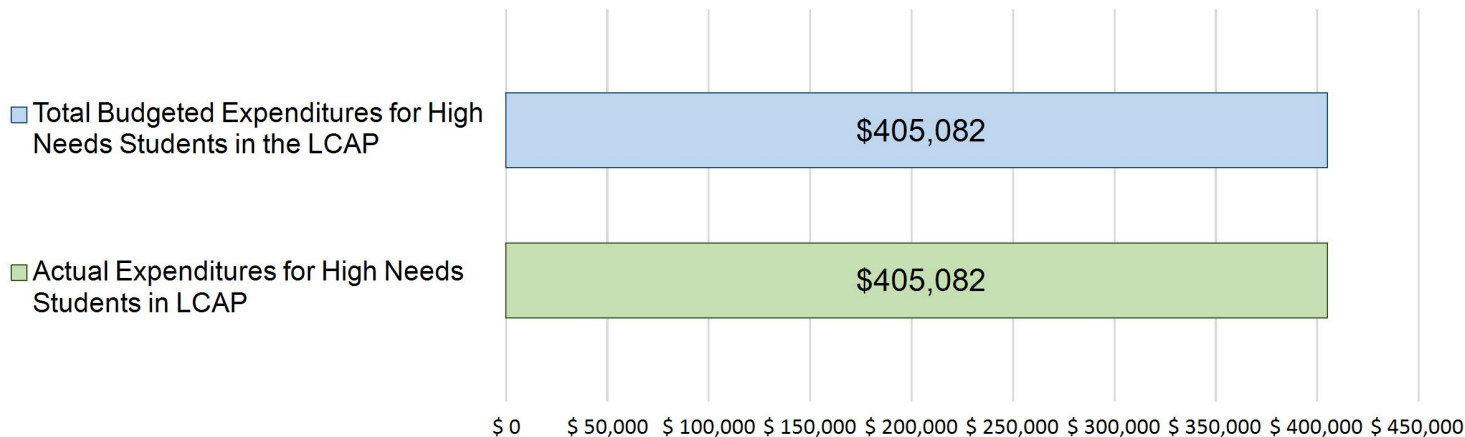
Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Community Montessori is projecting it will receive \$339,719 based on the enrollment of foster youth, English learner, and low-income students. Community Montessori must describe how it intends to increase or improve services for high needs students in the LCAP. Community Montessori plans to spend \$339,719 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 2025-26

Prior Year Expenditures: Increased or Improved Services for High Needs Students



This chart compares what Community Montessori budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Community Montessori estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Community Montessori's LCAP budgeted \$405,082 for planned actions to increase or improve services for high needs students. Community Montessori actually spent \$405,082 for actions to increase or improve services for high needs students in 2025-26.

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
Community Montessori	Earl Otte School Director	eotte@cmcharter.org (760) 445-4907

Plan Summary [2026-27]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Community Montessori School (CM) is a non-classroom based independent study TK-8 charter school sponsored by the San Diego County Office of Education serving approximately 800 students in San Diego County. CM was established in 2018 to meet the needs of families that desired a Montessori education with a high level of parent involvement. CM operates learning centers in Santee, Poway, Carlsbad, South Escondido, and North Escondido.

CM serves a diverse group of students with the goal of promoting a culture of education which empowers students to find and develop their passion and inspire the natural desire to explore and learn through choice and flexibility. Educational standards for each student develop from the Montessori methodology, Common Core, a research-based learning styles program, and the developmental stages of the learner and are met through the collaborative efforts of students, parents, mentors, resource centers, and community resources. Students work with students both within and outside their grade level and have access to teachers with a wide variety of interests and backgrounds. Students demonstrate mastery by making progress toward expertise in areas related to their educational goals. They demonstrate autonomy through choice and self-directed learning activities. They demonstrate a sense of purpose by engaging in meaningful learning which contributes to something larger than themselves in their educational journey to adulthood.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

The report on Community Montessori School (CM) details various aspects of the school's performance under California's Accountability System.

School Overview

Community Montessori School is a TK-8 charter school located in Escondido, California, with additional learning centers across San Diego County. It serves approximately 795 students, emphasizing Montessori education and high parent involvement. The school is recognized for ensuring standards are met in key areas including teacher qualifications, instructional materials, and school facilities.

Academic Performance

- English Language Arts: Community Montessori students perform well, with an average score of 23.5 points above standard. The performance is stable with an increase of 3.2 points from the previous year.
- Mathematics: The school shows a deficit of 17.3 points below standard, but maintained -0.9 points compared to the previous year.

Student Demographics

- 17.7% of students are socioeconomically disadvantaged.
- 2.9% are English learners.
- The school has a diverse racial composition, but specific groups like African American, Filipino, and Homeless have fewer than 11 students, limiting data disclosure due to privacy.

Academic Engagement

- Chronic Absenteeism: Virtually non-existent with 0% chronic absenteeism, indicating high student engagement.
- Suspension Rate: Very low at 0.6%, with minor fluctuations in certain demographics but generally stable.

School Climate and Conditions

- Community Montessori provides a supportive learning environment as evidenced by minimal suspensions and high standards in the physical and educational resources available to students.
- The school actively engages parents and families through various initiatives and maintains strong communication and community involvement.

Local Indicators and Standards Met

- Community Montessori meets all local educational standards and indicators, including the implementation of academic standards and access to a broad course of study.
- The school uses self-assessment tools to evaluate and report its progress in areas such as academic standards implementation, parent and family engagement, and local climate surveys.

Equity and Access

- The school tracks the extent to which students have access to a broad curriculum. There are no identified barriers preventing access, ensuring all students benefit from a full Montessori classroom experience.
- Equity in academic performance remains a focus, with ongoing efforts to address underperformance among English learners and students with disabilities.

Overall, Community Montessori School appears to be on a positive trajectory with robust systems in place for monitoring and enhancing student performance, engagement, and overall educational quality. These predictions assume continued commitment to the school's current strategies and responsiveness to emerging educational challenges.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

N/A

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.

Support for Identified Schools

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

Monitoring and Evaluating Effectiveness

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

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parents	Updates and input solicited primarily through surveys that were distributed and promoted via weekly class newsletters, Parent Square posts and Parent Club meetings. The Advisory Council met 3x in the year and LCAP was discussed at all three meetings
Staff	Updates and input solicited through weekly staff newsletters, Parent Square posts, Regional and school wide staff meetings and Advisory Council. Staff are also surveyed at every monthly staff meeting.
Students	Input solicited via surveys that students could access in class or online at home. Student input sought during regular class meetings and through the advisory council.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Partner input is actively solicited via a variety of channels such as surveys, social media, phone calls, emails, texting, newsletters, orientations, site meetings and activities, etc. Community Montessori has intentionally aligned all site plans to address student engagement, learning, and achievement, so in developing each specific plan, educational partners are invited to virtual and, when appropriate, in-person meetings. Input from students and families is frequently solicited formally through surveys and planned meetings, and when students are interacting with their teachers and other staff members in academic settings. Significant expansion of opportunities for families, students, and other educational partners to engage with the learning community was implemented to assist the development of future plans. Staff, student and Parent feedback for the LCAP was actively solicited through surveys, Advisory Council meetings and Parent Square posts and announcements.

We saw a noticeable increase in parent and staff survey participation this year. The following feedback was used in shaping how we budgeted for our goals moving forward. Parent participation was up from 15% to 44% and student participation from 60% to 68%. This increased feedback helped confirm that the community shares our goals of ensuring our school does all it can to provide a high quality

Montessori education. Compared to prior years, more families referenced appreciation for school culture, belonging, and individualized support systems. The work done in the areas of Social and Emotional learning is now paying dividends as students report high levels of safety and a strong sense of belonging. We want to make sure that we continue this positive trend.

Staff perceptions reflect a strong instructional foundation with growing capacity. More staff identifying strengths in current systems rather than foundational gaps but they are still seeking balance between teacher autonomy while adhering to program wide efforts to ensure consistency across all sites. Majority of staff report strong student engagement and connection with classrooms reflect relationship-based, student-centered learning environments. Staff feel that students demonstrate independence, ownership, and engagement in learning and staff value the sense of community and belonging within CM. Staff see inconsistent parent understanding of Montessori philosophy and expectations and would like to expand parent education around Montessori philosophy and expectations (academic and non-academic).

As part of an Annual Determination, Community Montessori will be monitored in the Targeted Level 1 for Performance Element, and is working directly with the El Dorado County SELPA on this. The LCAP was shared with the SELPA.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	Support high-quality teachers in their implementation of a Montessori program that is cohesive, aligned, equitable, and standards-based, resulting in proficiency in California state standards for all students and that prepares students for high school, college and career readiness.	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Our Charter document clearly outlines our mission, "Educational standards for each student develop from the Montessori philosophy of learning and the State Standards". In order to support this we need to support Educational Facilitators in implementing an effective Montessori Program that aligns with State Standards. We believe that the this goal continues the work started in our last LCAP but by shifting the focus and resources to " a high quality Montessori program" we can ensure that we are better serving our students, staying true to our philosophy and meeting the goals of our charter document. Sourcing already trained Montessori teachers has proven very difficult and so we are looking at a variety of ways to support our staff in becoming proficient in Montessori education.

We still have a high proportion of our students moving through the MTSS Process and ending up in Special Education. Providing staff more tools and strategies in the General Education classroom could help reverse this trend.

Our EL population has increased over time and we believe that this trend will continue. Focusing on this student population is an important piece of this goal. Math scores remain low.

Finding trained Montessori teachers continued to be challenging, prompting us to explore various methods, including the development of our own in house training, to help our staff excel in Montessori pedagogy. The closure of a local Montessori training center necessitated bringing all Montessori training in house. We had 2 primary staff complete the NAMC Montessori certificate, under the guidance of a AMS Certificated staff member. All of our primary staff are now Montessori trained and we will continue to utilize this program moving forward.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	I-Ready ELA Diagnostics whole school	Grade 3 = 81% Grade 4 = 59% Grade 5 = 50% Grade 6 = 64% Grade 7 = 62% Grade 8 = 74%	Grade 3 = 76% Grade 4 = 73% Grade 5 = 61% Grade 6 = 65% Grade 7 = 71% Grade 8 = 65%	Grade 3 = 67% Grade 4 = 57% Grade 5 = 68% Grade 6 = 57% Grade 7 = 63% Grade 8 = 73%	Grade 3 = 80% Grade 4 = 80% Grade 5 = 80% Grade 6 = 80% Grade 7 = 80% Grade 8 = 80%	Current Difference from Baseline: Grade 3: -14 percentage points Grade 4: -2 percentage points Grade 5: +18 percentage points Grade 6: -7 percentage points Grade 7: +1 percentage point Grade 8: -1 percentage point
1.2	I-Ready Math Diagnostics whole school	Grade 3 = 47% Grade 4 = 41% Grade 5 = 41% Grade 6 = 54% Grade 7 = 32% Grade 8 = 21%	Grade 3 = 44% Grade 4 = 53% Grade 5 = 45% Grade 6 = 44% Grade 7 = 48% Grade 8 = 25%	Grade 3 = 51% Grade 4 = 48% Grade 5 = 60% Grade 6 = 42% Grade 7 = 37% Grade 8 = 40%	Grade 3 = 60% Grade 4 = 60% Grade 5 = 60% Grade 6 = 60% Grade 7 = 60% Grade 8 = 60%	Current Difference from Baseline: Grade 3: +4 percentage points Grade 4: +7 percentage points Grade 5: +19 percentage points Grade 6: -12 percentage points Grade 7: +5 percentage points

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						Grade 8: +19 percentage points
1.3	CAASPP ELA Results	<p>60% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 42% Grade 4 = 40% Grade 5 = 44% Grade 6 = 40% Grade 7 = 60% Grade 8 = 67%</p> <p>English Language Learners (ELL)- Grade 3 = 25% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = null</p>	<p>61% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 48% Grade 4 = 41% Grade 5 = 50% Grade 6 = 38% Grade 7 = 31% Grade 8 = 58%</p> <p>English Language Learners (ELL)- Grade 3 = 33% Grade 4 = 0% Grade 5 = null Grade 6 = 0% Grade 7 = 0% Grade 8 = 0%</p>	<p>62% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 54% Grade 4 = 45% Grade 5 = 50% Grade 6 = 20% Grade 7 = 50% Grade 8 = 58%</p> <p>English Language Learners (ELL)- Grade 3 = 33.3% Grade 4 = null Grade 5 = 0% Grade 6 = null Grade 7 = 0% Grade 8 = 0%</p>	65% of students met or exceeded CAASPP standards	<p>Current Difference from Baseline:</p> <p>Whole school performance increased from 60% to 70%, representing a 10 percentage point increase from baseline.</p>
1.4	CAASPP Math Results	<p>45% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 35% Grade 4 = 10% Grade 5 = 33% Grade 6 = 35% Grade 7 = 33%</p>	<p>48% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 24% Grade 4 = 34%</p>	<p>45% of students met or exceeded CAASPP standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 23% Grade 4 = 27%</p>	55% of students met or exceeded CAASPP standards	<p>Current Difference from Baseline:</p> <p>Whole school performance remained stable overall at 45% meeting or exceeding standards, representing no</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		Grade 8 = 25% English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = null	Grade 5 = 20% Grade 6 = 38% Grade 7 = 15% Grade 8 = 17% English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = null Grade 6 = 0% Grade 7 = 0% Grade 8 = 0%	Grade 5 = 14% Grade 6 = 30% Grade 7 = 0% Grade 8 = 0% English Language Learners (ELL)- Grade 3 = 33.3% Grade 4 = null Grade 5 = 0% Grade 6 = null Grade 7 = 0% Grade 8 = 0%		overall percentage point change from baseline.
1.5	Suspension Rates	2.6%	0	<1%	1%	1.6%
1.6	Expulsion Rates	0	0	0	0	0
1.7	Attendance rate as measured by the Monthly Attendance Summary Report	98%	99%	99%	100%	1%
1.8	% of Students referred for Special Education Assessment	6% of our student population went through the MTSS process and were referred for Special Education Assessment	5.1%		3% of students are referred for Special Education assessment	0.9%
1.9	% of non Montessori Certified Educational Facilitators that enroll in Montessori Training	80% of new Educational Facilitators have enrolled in Montessori Training	25%	33%	100% of new Educational Facilitators have enrolled in Montessori Training	-67%
1.10	% of teachers that are appropriately assigned and experienced per CalsAAs report	1 per year	0	0	0	1

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.11	% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores	42% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores	<p>ELA- 44% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores</p> <p>MATH- 26% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores</p> <p>AVG: 35%</p>	<p>ELA- 46% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores</p> <p>MATH- 17% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores</p> <p>AVG: 32%</p>	50% of Socio Economically Disadvantaged student meet or exceed CAASPP Scores	<p>Current Difference from Baseline:</p> <p>Socio-economically disadvantaged student overall avg performance decreased from 42% at baseline to 32% in Year 2, representing a 10 percentage point decrease overall.</p> <p>ELA SED performance increased from year 1 (44%) to year 2 (46%) (+2 percentage points), while Math performance decreased to 17% from 26%.</p>
1.12	% of EL Learners that progress to next level of reclassification	<p>27% of students taking the ELPAC in 2024- tested as "well developed."</p> <p>33 ELPAC testers</p>	<p>35% of students taking the ELPAC in 2024- tested as "well developed."</p> <p>34 ELPAC testers</p>	<p>35% of students taking the ELPAC in 2025- tested as "well developed."</p> <p>20 ELPAC testers</p>	<p>65% advance by at least one level this year</p> <p>25% maintained their level this year</p> <p>10% decreased a level this year</p>	Maintained
1.13	CAASPP ELA Results for EL Students	7% EL students met or exceeded standards	6% EL students met or exceeded standards	9% EL students met or exceeded standards	20% EL students met or exceeded standards	+3% EL students met or exceeded standards

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.14	CAASPP Math Results for EL Students	0 % EL students met or exceeded standards	0% EL students met or exceeded standards	9% EL students met or exceeded standards	20 % EL students met or exceeded standards	+9% EL students met or exceeded standards
1.15	I-Ready ELA Diagnostics Unduplicated Students	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 71% Grade 4 = 45% Grade 5 = 31% Grade 6 = 46% Grade 7 = 46% Grade 8 = 61%</p> <p>English Language Learners (ELL)- Grade 3 = 66% Grade 4 = 20% Grade 5 = null Grade 6 = 0% Grade 7 = 25% Grade 8 = 0%</p>	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 54% Grade 4 = 36% Grade 5 = 29% Grade 6 = 50% Grade 7 = 14% Grade 8 = 17%</p> <p>English Language Learners (ELL)- Grade 3 = 33% Grade 4 = null Grade 5 = 25% Grade 6 = null Grade 7 = 0% Grade 8 = 0%</p>	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 46% Grade 4 = 46% Grade 5 = 25% Grade 6 = 23% Grade 7 = 17% Grade 8 = 67%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = null Grade 5 = null Grade 6 = 0% Grade 7 = 0% Grade 8 = null</p>	<p>Goals for Socio-Economically Disadvantaged (SED) Students Grade 3: Aim for an increase to 75%, a 4% increase reflecting steady, achievable growth. Grade 4: Target 50%, a moderate 5% increase that acknowledges the challenges but pushes for improvement. Grade 5: Set a goal of 35%, which is a 4% increase, aiming for gradual improvements. Grade 6: Raise the target to 50%, a balanced 4% increase. Grade 7: Also set at 50%, representing a moderate 4% growth. Grade 8: Aim slightly higher at 65%, a 4%</p>	<p>Current Difference from Baseline: Results for socio-economically disadvantaged (SED) students demonstrated mixed performance compared to baseline data. Gains were observed in Grade 8 (+6 percentage points) and Grade 4 (+1 percentage point), while declines occurred in Grades 3, 5, 6, and 7. English Learner (ELL) performance fluctuated across grade levels due to small subgroup populations and limited available data.</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					<p>increase, to continue building on relatively stronger baseline performance.</p> <p>Goals for English Language Learners (ELL) Grade 3: Increase to 70%, a solid 4% increase. Grade 4: Aim for a substantial increase to 25%, recognizing the particularly low baseline. Grade 5: Due to the absence of baseline data, set an initial target of 30% as a starting goal. Grade 6: Establish 5% as the goal given the 0% baseline, aiming for initial positive outcomes. Grade 7: Target 30%, a substantial 5% increase. Grade 8: Set a goal of 5%, aiming</p>	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					<p>for early positive results from targeted supports.</p> <p>These goals consider the starting points and typical growth patterns for similar student populations, while also aiming to close the achievement gap.</p>	
1.16	I-Ready Math Diagnostics Unduplicated Students	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 38% Grade 4 = 22% Grade 5 = 10% Grade 6 = 40% Grade 7 = 7% Grade 8 = 8%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 20% Grade 5 = null Grade 6 = 0% Grade 7 = 0% Grade 8 = 0%</p>	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 15% Grade 4 = 9% Grade 5 = 19% Grade 6 = 10% Grade 7 = 33% Grade 8 = 0%</p> <p>English Language Learners (ELL)- Grade 3 = 33% Grade 4 = null Grade 5 = 0% Grade 6 = null</p>	<p>(Winter assessment)- On or above grade level Socio-economically disadvantaged (SED)- Grade 3 = 18% Grade 4 = 46% Grade 5 = 40% Grade 6 = 15% Grade 7 = 17% Grade 8 = 33%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = null Grade 5 = null Grade 6 = 0%</p>	<p>Goals for Socio-Economically Disadvantaged (SED) Students Grade 3: Target a 5% increase to 43%, fostering gradual improvement. Grade 4: Aim for a 5% increase to 27%, acknowledging the low baseline but striving for progress. Grade 5: Set a goal of 15%, a 5% increase, to initiate recovery from a</p>	<p>Current Difference from Baseline: Results for socio-economically disadvantaged (SED) students showed improvement in Grades 4 (+24 percentage points), Grade 5 (+30 percentage points), Grade 7 (+10 percentage points), and Grade 8 (+25 percentage points). Declines were observed in</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
			<p>Grade 7 = 0% Grade 8 = 0%</p>	<p>Grade 7 = 0% Grade 8 = null</p>	<p>very low starting point. Grade 6: Increase the target to 45%, a modest 5% rise. Grade 7: Aim for a significant boost to 12%, reflecting a focus on intensive interventions. Grade 8: Set a goal of 13%, a 5% increase, to start building momentum from a low base.</p> <p>Goals for English Language Learners (ELL) Grade 3: Set an ambitious initial target of 5% to start seeing positive results from targeted support. Grade 4: Aim for a 5% increase to 25%, building on an existing foundation. Grade 5: Due to the absence of baseline data, set</p>	<p>Grades 3 and 6 compared to baseline performance.</p> <p>English Learner (ELL) performance remained inconsistent across grade levels due to small subgroup sizes and limited available data.</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					<p>an initial target of 5% as a starting goal. Grade 6: Set a goal of 5%, working from a 0% baseline to achieve early gains. Grade 7: Target a 5% increase, focusing on early positive results and foundational learning. Grade 8: Aim for 5%, working towards initial progress from a 0% start.</p> <p>These proposed goals reflect an understanding of the particular challenges faced by each student group, aiming for steady, incremental gains.</p>	
1.17	Overall I-Ready participation rates for grades 3-8	Collected starting academic school year 2024-2025.	ELA Total Time on Task (minutes) 3-5: 65,586 6-8: 28,855	ELA- 5h 4m Average Lesson Time-on-Task per Student (i-Ready changed this	For ELA and Math Grades 3-5 60 minutes/week = 2100 minutes per year	Since beginning formal collection of i-Ready instructional participation data

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
			<p>Math Total Time on Task (minutes) 3-5: 248,238 6-8: 133,491</p>	<p>report 25-26; from overall total time on task to avg lesson time on task)</p> <p>Math- 5h 31m Average Lesson Time-on-Task per Student (i-Ready changed this report 25-26; from overall total time on task to avg lesson time on task)</p>	<p>Grades 6-8 90 minutes/week = 3150 minutes per year</p>	<p>in 2024–2025, Year 2 findings show continued student engagement across grades 3-8, with stronger overall participation in Math than ELA. Average student instructional time during 2025–2026 reached approximately 5 hours and 4 minutes in ELA and 5 hours and 31 minutes in Math. While engagement data indicates active student participation with the platform, average overall usage may remain below i-Ready’s recommended annual instructional benchmarks (report changed).</p>
1.18	% of eligible students completing the PFT	Collected starting academic school year 2024-25	100% of Eligible students participated	100% of Eligible students participated	100% of Eligible students will participate in PFT	New metric developed for new Action Item 1.8

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.19	% of students participating in PE lessons at the Learning Centers	Collected starting academic school year 2024-25	80% of students participated in a weekly PE lesson	0		New metric developed for new Action Item 1.8

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Overall Implementation

It was noted by our authorizer that our original board approved LCAP had not fully satisfied State Priority 1. To do this we added a metric that measured the percentage of appropriately assigned and experienced teachers.

It was noted by our authorizer that our original board approved LCAP had not shown one of the approved metrics used as evidence to satisfy State Priority 5. It was decided to measure attendance as a way of satisfying this priority.

Successful Implementation

- Action Item 1.2 Structured Literacy - We started focusing on the Upper Elementary Team this year. Worked to implement Logic of English with support from Structured Literacy Coach. All Upper Elementary staff are completing a Professional Development Course through The Writing Revolution. One teacher is completing a Special Assignment to help create a more cross curricula approach that intergrates Structured Word Inquiry with all areas of the Montessori curriculum.
- Action Item 1.4 Professional Learning – All staff were certified in Positive Discipline. Teams at each Learning Center were identified and trained in Crisis Intervention Prevention.
- Action Item 1.5 EL Supports - More time was spent providing EL families and student with test preparation tools and resources.
- Action Item 1.6 Mentors and Lead EFs – All new EF's were assigned a staff member for their first 6 months with the organization to help learn our systems and procedures. Tenured staff appreciated the opportunity to demonstrate their leadership potential and new staff reported high levels of satisfaction with their mentors.
- Action Item 1.7 I-Ready Students were asked to do more I-Ready lessons as homeschool activities. I-Ready is also one of the tools we use in our SST process to help struggling students. Staff also asked students to complete the assessments at the Learning Center.

Implementational Challenges

- Action Item 1.1 Montessori Certification – A Montessori Training Center that we had been using to send staff to closed down. We responded by bringing our training more in house and enrolling staff in an online Montessori Training program through NAMC. Prior to its closing, we did have 3 staff complete their Elementary training and one other complete their training with AMS. 2 more staff completed their Montessori training via our new in house program.
- Action Item 1.5 EL Supports - Staffing challenges have made this goal hard to achieve.
- Action Item 1.7 I-Ready – Online learning and computer time are not viewed as appropriate in a Montessori environment. We are using an online reading screener, "Amira", that has helped staff identify students with possible reading difficulties much sooner. Next year we will provide more guidance to families on helping students learn typing skills at home to alleviate test taking anxiety.

Modified Implementation

- Action Item 1.7 I-Ready – I-Ready assessments were are still optional for K-2 as online time is not seen as foundational in our philosophy. Families that were interested were provided with logins to complete at home.

Non-Implemented Actions

- All items were implemented

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- There was no material difference between budgeted and actual expenditures

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Based on our analysis of metrics and outcomes, the implementation of actions continue to show a mixed level of effectiveness in achieving Goal 1, as demonstrated by both quantitative and qualitative indicators.

- Action Item 1.1 and 1.2 I-Ready – Declines at nearly all grade levels are alarming but this is somewhat mitigated by the fact that this is not reflected in the CAASPP scores
- Metric 1.3 CAASPP ELA Results show a 1% improvement
- Metric 1.4 CAASPP Math results show a 3% decrease
- Metric 1.11 % of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores – 9%. This is due in large part to the low performance of this group in math. So while they have showed gains in ELA, this is not replicated in math
- Metric 1.14 and 1.14 - EL students showed 3% gains in ELA and 6% gains in Math
- Attendance, suspension and expulsion rates are all excellent, indicating a high level of buy in to the program.

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

Goal Description: No changes to current goal

Metrics Modifications

- Metric 1.3 – due to low % of increase in this it was determined that the target for ELA be adjusted from 70% to 65%
- Metric 1.19 - due to difficulty in getting parent responses it was decided to measure student participation rates in PE classes offered at the Learning Centers. Based on projected staffing, it will not be feasible to provide staff with as much time with a PE specialist as we had done. We believe that the work done this year has laid a solid foundation for the future growth of the PE program at Community Montessori.

Actions Modifications

- Action Item 1.5 EL Supports - further training will continue to be provided to all General Ed teachers, Learning Assistants and Student support team on working with EL students.
- Action Item 1.1 Montessori Certification. The LEA is now providing its own foundational Montessori training that can be undertaken while staff are completing their CA Credential program. Certificated Montessori staff will be mentoring staff through the NAMC online program

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Montessori Certification	Current staff who have no formal Montessori Training will become Montessori certified. This is crucial to maintain the integrity of the program and to ensure that all staff are providing the same experience for all student in every classroom. Based on the ongoing challenges to find a Montessori training that works with the schedule of the District Intern programs, we are planning on providing our own in house Montessori certification program. We will help new staff focus on completing their District Intern credential ASAP so that they can then move on to their Montessori training. To facilitate this, the LEA will pay for the District Intern mentors	\$15,000.00	Yes

Action #	Title	Description	Total Funds	Contributing
1.2	Structured Literacy	Literacy continues to be an area of focus, especially looking for ways to support our English Learners. We have made great strides in the implementation of this program, we are now looking to ensure that we maintain the progress made. Newly hired staff will need to be trained in this program. Staff will also need training on using new Reading Screener program and how best to interpret the results in the context of the Structured Literacy program. Supporting staff and students with the continued rollout of the Logic of English program and the integration of more direct explicit cursive instruction will be undertaken through the purchase of specific resources and and professional development time	\$35,000.00	Yes
1.4	Professional Learning	Increase educator efficacy in supporting all unduplicated students in engagement, learning, and achievement. Provide training to instructional staff for using general education interventions, data, SEL, and Positive Discipline methods/frameworks. Where needed and identified, provide culturally appropriate curriculum and resources. Providing opportunities for staff to attend Professional Development trainings and conferences specifically aimed at our unduplicated students	\$10,000.00	Yes
1.5	EL Supports	Currently 5% of our student population are identified as English Learners and we predict this number to increase. CAASPP test scores for both Math and ELA were very low so this is an area of focus for us. We will therefore provide more training, resources and staff to EL Students, including providing resources and training for Gen Ed Teachers, Learning Assistants and Instructional Aides to work with this student population. Research and Evaluation manager will focus on data collection and analysis for this group of students so that we can monitor where help is needed and the impact that our help is having on this group.	\$148,219.00	Yes
1.6	Reflex Math	Our school wide math scores are lower than our ELA scores, and our unduplicated students are below state averages. We are looking at more ways to provide students with math fluency. Math Reflex is a program that can be utilized at home and at the Learning Centers and is geared to helping students master basic math facts. Since it is an online program,	\$3,000.00	Yes

Action #	Title	Description	Total Funds	Contributing
		low incomes students will need to be provided with the necessary technology to access this insruction.		
1.7	I-Ready	I-Ready is the assessment tool that the LEA uses as one way to measure student progress. Students also have access to I-Ready curriculum and online resources. The online accessibility allows families to use this as one tool in their independent study toolbox and can be a resource for staff to gauge a child's progress. Assessment data is also used as a guide in the MTSS process.	\$30,000.00	Yes
1.8	Development of a robust PE program	Montessori recognizes the importance of educating the whole child. Healthy children will learn better and our role as partners with parents means we can provide students and their families with resources and ideas to help build healthy lifestyles. We will be dedicating a staff member to the development of a more robust PE program that provides students, staff and families with resources and ideas to meet this goal. There will be more staff PD opportunities related to the PE program.	\$2,000.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Ensure facilities are in good repair and are set up and maintained in a way that supports Montessori pedagogy, including adequate technology.	Maintenance of Progress Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

A cornerstone of the Montessori Philosophy is the concept of the Prepared Environment. Every classroom at Community Montessori must be set up and equipped in a way that aligns with the Montessori Philosophy and is suitable for the developmental age range that it serves. Technology changes constantly and we need to keep up to date with equipment that still aligns with our philosophy and helps prepare students for high school and beyond. While the focus here is on materials and physical environment, the adults that are a part of this also need to be supported.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Montessori Materials Classroom Inventory	85% of classes have all of the materials listed on the Montessori Materials Classroom Inventory	Staff were surveyed and asked to complete an inventory list. Based on this 89% of classrooms have at least 70% of all the	Staff were surveyed and asked to complete an inventory list. Based on this 95% of classrooms have at least 80% of all the	100% of class have 100% all of the Montessori Materials as based on a standard Classroom Inventory	-5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
			Montessori materials listed	Montessori materials listed		
2.2	Facilities Inspection Tool	Facilities currently ranked "Good" on the facilities inspection tool	Facilities are ranked "Good"	Facilities are ranked "Good"	All facilities will receive a rank of "Good" or better on the Facility Inspection Tool	none
2.3	Technology inventory	Every classroom has one iPad Laptops Lower Elementary 5 Upper Elementary 8 Middle School 1 per student	Every classroom has one iPad Laptops Lower Elementary 5 Upper Elementary 8 Middle School 1 per student	Every classroom has one iPad Laptops Lower Elementary 5 Upper Elementary 8 Middle School 1 per student	Every classroom has 2 iPads Laptops Lower Elementary 5 Upper Elementary 8 Middle School 1 per student	none
2.4	% of low income students that request a laptop for home use % of low income students who request a Wi-Fi hotspot for home use	This has not been measured to date	100%- of low income students that request a laptop for home use 2%- of low income students who request a Wi-Fi hotspot for home use	100%- of low income students that request a laptop for home use 100%- of low income students who request a Wi-Fi hotspot for home use	100% of low income students that request a laptop for home use will receive one 100% of low income students who request a Wi-Fi hotspot for home use will receive one	n/a

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Overall Implementation
Successful Implementation

- Action Item 2.1 Montessori Materials – We have increased the size of the essential Montessori materials list, particularly in the area of Math materials.
- Action Item 2.2 Facility Improvements - Several larger projects were completed
- Action Item 2.3 Technology – all classrooms were provided with agreed technology

Implementational Challenges

- None

Modified Implementation

- Permitting for the animal enclosure at Oak Hill took longer than anticipated. The project has now been approved by the board and construction will begin this summer.

Non-Implemented Actions

- All items were implemented

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Action Item 2.3 Technology - all students were provided with necessary technology and the school was able to use existing supplies to meet this goal so there was no expenditure needed to meet this action item.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Based on our analysis of metrics and outcomes, the implementation of actions showed a high level of effectiveness in achieving Goal 2, as demonstrated by both quantitative and qualitative indicators.

- Metric 2.1 Montessori Materials Inventory
- Metric 2.2 Facilities Inspection Tool – at our last Williams visit we received a “Good” ranking and we continue to use this tool as our road map for facility repairs and improvement
- Action 2.2 Facility Improvements

o Artificial turf was installed at Santee and Poway Learning Centers -greatly facility a safer play area and an area for PE

o New retaining wall and fence at Poway that increased the size of the outdoor area

o Oak Hill - Replaced several doors at the Learning Center and got plan approval for farm improvements

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

No planned changes to current goal

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Montessori Materials	The LEA will continue to replace broken/missing Montessori materials as needed, based on classroom inventory. One of the principals of Montessori is the prepared environment and staff spent a lot of time developing a list of essential Montessori materials for each classroom. The LEA spent a large portion of their general funds ensuring that these materials are in every classroom and now we want to make sure that this is maintained.	\$5,000.00	No
2.2	Facility Improvements	Various capital projects to improve and maintain our Learning Centers. Students and staff need to have a safe, comfortable place to learn and work. We will continue to ensure that we meet all applicable state and local codes as well as continue to improve our Learning Centers. Larger projects include installation of artificial turf at Poway, new fence at Poway, construction of an animal barn and replacing some doors at Oak Hill.	\$80,000.00	No
2.3	Technology	Continue to maintain existing ratio of students to laptops in each grade level. Provide internet access and laptops as needed to Socio Economically Disadvantaged families for home school learning so that they can successfully access this curriculum. Based on existing inventory it is not anticipated to spend any LCFF Funds on this item.	\$0.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Engage parents, staff, students and community to promote meaningful educational opportunities for all students within a warm, caring, inspirational environment.	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)

An explanation of why the LEA has developed this goal.

At Community Montessori, sustained parent/guardian involvement in the education of their children contributes greatly to student achievement and a positive school environment. The success of our independent study model hinges on effectively engaging parents by providing them with support and resources to fulfill their role as the primary educator. CM will work with parents/guardians and family members to jointly develop and agree upon strategies to meaningfully involve parents/guardians and family members in district and school activities at all grade levels; advisory, decision-making, and advocacy roles; and activities to support learning at home. Parents/guardians shall continue to be notified of their rights to be informed about and to participate in their children's education and of the opportunities available to them to do so. Parents will also be held accountable to the agreements made for the successful learning experience of their child.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Parent Participation Rates in Learning Center Activities	60% of families attend at least one Learning Center event each year	70%	Parent participation rates in Learning Center activities remained high across all	80% of families attend at least one Learning Center event each year	Minimum of 20% + increase in parent participation in Learning Center activities.

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
				<p>sites, ranging from 85% to 95%.</p> <p>Santee demonstrated the highest participation rate at 95%, followed by Poway at 90%. Carlsbad, Mary Lane, and Oak Hill each maintained strong participation rates of 85%, reflecting consistent family engagement across Learning Center activities.</p>		
3.2	Survey Completion Rates	20% of families complete all surveys	Parent- 15% Student- 60% Staff- 40%	Parent- 349/801(44%) 25-26 collection Student- 125/162 (77%) grades 6-12 158/270 (59%) grades 3-5 Staff- 25%	75% of families complete all surveys	<p>Since baseline implementation, survey participation has increased across several stakeholder groups.</p> <p>Parent participation grew from 15% to 44% (349/801 families), while student participation reached 77% in grades 6-12 and 59% in grades 3-5.</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						Staff participation currently remains below baseline expectations at 25%. Overall trends indicate increased engagement with organizational feedback and survey collection efforts, though continued growth is needed to meet the long-term goal of 75% family completion across all surveys.
3.3	Family Attendance at Student Led Conferences	75% of families attend student led conferences	97%	100%	100% of families attend student led conferences	+25% increase from baseline in family attendance at student led conferences.
3.4	% of parents attending Parent Club Meetings	40% of parents attend at least one Parent Club meeting each year	25%	Parent participation in Parent Club meetings varied across Learning Centers, ranging from 15% to 30%. Poway demonstrated the highest participation rate at 30%, while	40% of parents attend at least one Parent Club meeting each year	Increase percentage of participation in some cases 5%.

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
				Carlsbad, Oak Hill, and Santee each reported 15% participation. Mary Lane reported 20% participation. Overall, the data indicates continued opportunities to strengthen parent involvement in Parent Club activities across sites.		
3.5	% of Socio Economically Disadvantaged students that attend Field Trips	60% of Socio Economically Disadvantaged students attend Field Trips	23% of students that attended an overnight field trip(s) were identified as an SED student. 1% of students that attended overnight field trips were identified as an EL student.	35% of students that attended an overnight field trip(s) were identified as an SED student	80% of Socio Economically Disadvantaged students that attend Field Trips	+12 increase from year 1 and year 2; difference from baseline not applicable.

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Successful Implementation

- Action Item 3.1 Learning Center Events – All Learning Centers provided a variety of events for families to attend

- Action Item 3.3 Staff Social and Emotional Wellbeing - Staff were surveyed at the end of every monthly meeting. There was a continued focus on Grade Level Professional Learning Communities and the development of Lead teachers to help facilitate these groups.
- Action Item 3.4 Field Trips – all grade levels completed at least 3 field trips. For younger students this includes visits from outside organizations.

Implementational Challenges

- Action Item 3.3 Staff Social and Emotional Wellbeing - surveys are anonymous to encourage people to provide feedback and input. This makes it challenging to see who has not completed the surveys and we do not get 100% participation in surveys.
- Action Item 3.4 Field Trips – there was a concerted effort to ensure that all students were given the opportunity to attend field trips. Some families and students are still opposed to overnight trips so getting 80% of all students to attend is challenging. All fundraising efforts this year were dedicated to helping offset the costs of Field Trips to ensure that every student that wants to attend a trip is able to do so.

Non-Implemented Actions

- All items were implemented

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Action Item 3.4 Field Trips – Upper Elementary increased the number of overnight field trips offered which increased the estimated expenditure on this item. Overall we had a much higher rate of participation in field trips which led to a much higher than anticipated cost. This cost was offset through fundraising efforts at all Learning Centers.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Effectiveness or Ineffectiveness

Based on our analysis of metrics and outcomes, the implementation of actions showed a high level of effectiveness in achieving Goal 3, as demonstrated by both quantitative and qualitative indicators.

Surveys

- Metric 3.2 shows parent participation growing from 15% to 44%
- Metric 3.3 Family attendance at Student-Led Conferences remained exceptionally strong across all Learning Centers, with each site reporting 100% participation. This reflects a high level of family engagement and ongoing collaboration between families, students, and staff in supporting student learning and progress.
- Metric 3.4 Poway demonstrated the highest participation rate at 30%, while Carlsbad, Oak Hill, and Santee each reported 15% participation. Mary Lane reported 20% participation. Overall, the data indicates continued opportunities to strengthen parent involvement in Parent Club activities across sites.

- Metric 3.6 Due to staffing issues, this data was not collected
- Action Item 3.3 Staff Social and Emotional Wellbeing -
 - o Staff surveys at the end of every monthly meeting continues to show high levels of satisfaction with topics covered at every meeting. Staff have shared both formally and informally how much they appreciate the support they get in their grade level Professional Learning Communities.

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

- No planned changes to current goal
- Metric 3.4 % of families attending Parent Club Meetings – in surveys parents have not felt the need to attend these meetings as they are satisfied with what is taking place. Based on projections we are lowering this target from 70% of families to 40% will attend.
 - Action Item 3.4 Field Trips – Upper Elementary increased the number of overnight field trips that they offered. We will monitor the impact this has on the participation in these events for our Low Income families
- * Metric 3.6- % of unduplicated families that attend community partnerships events" will not be measured as it is not practical to gather this data

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Learning Center Events	Provide ongoing workshops and events to parents, staff and students based on areas of interest and need to help provide the support and resources needed to succeed. Hold events that help foster community spirit and allow families to meet and engage with other members of the school community.		No
3.2	Community Partnerships	Continue and expand community partnerships to serve unduplicated students and families through the MLAC Council and other Learning Center events, including parent workshops that specifically address the unique parenting needs of these families. Provide a direct line for these	\$1,500.00	Yes

Action #	Title	Description	Total Funds	Contributing
		families to access resources and guidance, including translation services for meetings. Work with local community programs to show students opportunities outside of school. Greater parent/family support and engagement in their student's schooling experience is needed in so many of the decisions that are made with and for school programs. The greater the involvement, the more skilled and empowered parents will be to request and lead improvement efforts.		
3.3	Staff Social and Emotional Wellbeing	To be able to offer a warm, caring and inspirational environment, the emotional and physical needs of staff must be met. Regular staff surveys asking for feedback and input and their needs and providing monthly mindfulness opportunities, self care challenges and chances to work together on challenging situations so that all staff feel supported.	\$2,000.00	No
3.4	Field Trips	As part of providing meaningful educational opportunities, students will be able to attend a variety of different field trips at no cost to the families. Field trips are a cornerstone of our philosophy and help students build connections through a unique shared experience. It gives students who do not always shine inside the classroom, the opportunity to shine outside of it. The cost of these trips has increased significantly over the last few years, especially for transportation. For many of our socio economically disadvantaged students these trips offer them experiences that they may never have had before. It also contributes to greater parental engagement. Last year we had a very high participation rate in our overnight field trips and we are looking to keep this in place and will need to use more LCFF funds to make this happen.	\$95,000.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
4		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

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

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
----------	-------	-------------	-------------	--------------

Goals and Actions

Goal

Goal #	Description	Type of Goal
5		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

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

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
----------	-------	-------------	-------------	--------------

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2026-27]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$339,719	\$

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
3.924%	0.000%	\$0.00	3.924%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	<p>Action: Montessori Certification</p> <p>Need: Unduplicated students can have higher needs in the classroom, which means we need to provide teachers that are fully trained.</p> <p>Scope:</p>	By ensuring that our teachers are Montessori trained we are helping them meet the possible higher needs of all our unduplicated students. These students are spread out across the school, in all age groups so all staff should be trained	Measure the % of new hires that are not already Montessori trained who get Montessori trained

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide		
1.2	<p>Action: Structured Literacy</p> <p>Need: Low percentage of these students are meeting or exceeding test scores.</p> <p>Scope: LEA-wide</p>	By providing more targeted, direct and explicit instruction to this group we can give them the skills and strategies needed to be successful. The LEA is one school.	% increase in unduplicated students that meet or exceed ELA standards in the CAASPP test
1.4	<p>Action: Professional Learning</p> <p>Need: Unduplicated students often need a higher degree of social and emotional support in order to be successful learners</p> <p>Scope: LEA-wide</p>	Trainings and resources that are focused on the social and emotional needs of this group of students can help staff support these students so that they feel safe and can learn effectively. The LEA is one school	Student and staff surveys. Test scores of unduplicated students. Discipline incidents, expulsion and suspension rates
1.5	<p>Action: EL Supports</p> <p>Need:</p> <p>Scope: LEA-wide</p>	Currently 5% of our student population are identified as English Learners and we predict this number to increase. CAASPP test scores for both Math and ELA were very low so this is an area of focus for us. We will therefore provide more training, resources and staff to EL Students, including providing resources and training for Gen Ed Teachers, Learning Assistants and Instructional Aides to work with this student population. Research and Evaluation manager will focus on data collection and analysis for this group of	#of EL students getting reclassified EL students CAASPP and I-Ready Test Scores

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
		students so that we can monitor where help is needed and the impact that our help is having on this group. The LEA is one school	
1.6	<p>Action: Reflex Math</p> <p>Need: Low percentage of these students are meeting or exceeding test scores.</p> <p>Scope: LEA-wide</p>	By offering another option that is accessible both at the Learning Center and at home this group of students will have more resources and support to help ensure success.	Increase in CAASPP Math test scores for this student group
1.7	<p>Action: I-Ready</p> <p>Need: Low percentage of these students are meeting or exceeding test scores.</p> <p>Scope: LEA-wide</p>	By offering another option that is accessible both at the Learning Center and at home this group of students will have more resources and support to help ensure success.	% increase in I-Ready test scores for unduplicated students
1.8	<p>Action: Development of a robust PE program</p> <p>Need: Need to know what and how to achieve a healthy lifestyle. Do not have the knowledge or resources to do this.</p> <p>Scope:</p>	Healthy lifestyles and habits can be harder if families do not have the resources, both monetary and the time and space to enjoy nutritious meals and participate in healthy activities.	% of students participating in the Physical Fitness Test. % of students participating in PE Classes at the Learning Center

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide		
2.3	<p>Action: Technology</p> <p>Need: Students are independent study and will need technology and wi-fi access to access the full curriculum</p> <p>Scope: LEA-wide</p>	It provide the requisite resources to access the curriculum from home	% of eligible students who are provided with wifi access and/or laptops
3.2	<p>Action: Community Partnerships</p> <p>Need: Families of unduplicated students benefit from more targeted support</p> <p>Scope: LEA-wide</p>	By creating regular meetings and opportunities for families to share concerns and challenges, we can better shape what we provide and ensure that all these families are heard. By providing a forum for outside organizations to offer support and resources to these families we can ensure that they are better supported.	Attendance at events. Parent and staff surveys
3.4	<p>Action: Field Trips</p> <p>Need: Socio Economically disadvantaged students can often not afford these experiences.</p> <p>Scope: LEA-wide</p>	Socio Economically disadvantaged students make up 27% of our school population and these trips and experiences are often experienced only by going on a school field trip	% of socio economically disadvantaged students who go on these field trips. Student and parent surveys to gauge success of the field trip.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.5	<p>Action: EL Supports</p> <p>Need: EL Students can benefit from more concentrated, small group instruction to succeed</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	<p>Students are struggling to meet grade level standards. Having a staff member who is dedicated and focused on our EL learners will ensure they get the support that they need and staff will get the training that they need. The LEA is one school.</p>	<p>#of EL students getting reclassified EL students CAASSP and I-Ready Test Scores</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		
Staff-to-student ratio of certificated staff providing direct services to students	28:1	

2026-27 Total Planned Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	8,658,219	339,719	3.924%	0.000%	3.924%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$426,719.00	\$0.00	\$0.00	\$0.00	\$426,719.00	\$213,219.00	\$213,500.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Montessori Certification	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools	Annual	\$10,000.00	\$5,000.00	\$15,000.00				\$15,000.00	
1	1.2	Structured Literacy	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools	Annual	\$35,000.00	\$0.00	\$35,000.00				\$35,000.00	
1	1.3							Annual								
1	1.4	Professional Learning	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools	Annual	\$10,000.00	\$0.00	\$10,000.00				\$10,000.00	
1	1.5	EL Supports	English Learners	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners	All Schools	Annual	\$148,219.00	\$0.00	\$148,219.00				\$148,219.00	
1	1.6	Reflex Math	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools	Annual	\$0.00	\$3,000.00	\$3,000.00				\$3,000.00	
1	1.7	I-Ready	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools	Annual	\$0.00	\$30,000.00	\$30,000.00				\$30,000.00	
1	1.8	Development of a robust PE program	English Learners Low Income	Yes	LEA-wide	English Learners Low Income	All Schools		\$0.00	\$2,000.00	\$2,000.00				\$2,000.00	
2	2.1	Montessori Materials	All	No			All Schools	Annual	\$0.00	\$5,000.00	\$5,000.00				\$5,000.00	
2	2.2	Facility Improvements	All	No			All Schools	One Year	\$0.00	\$80,000.00	\$80,000.00				\$80,000.00	
2	2.3	Technology	Low Income	Yes	LEA-wide	Low Income			\$0.00	\$0.00	\$0.00				\$0.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
3	3.1	Learning Center Events	All	No			All Schools	Annual								
3	3.2	Community Partnerships	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	annual	\$0.00	\$1,500.00	\$1,500.00				\$1,500.00	
3	3.3	Staff Social and Emotional Wellbeing	All	No			All Schools	Annual	\$0.00	\$2,000.00	\$2,000.00				\$2,000.00	
3	3.4	Field Trips	Low Income	Yes	LEA-wide	Low Income		Annually	\$10,000.00	\$85,000.00	\$95,000.00				\$95,000.00	

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
8,658,219	339,719	3.924%	0.000%	3.924%	\$339,719.00	0.000%	3.924 %	Total:	\$339,719.00
								LEA-wide Total:	\$339,719.00
								Limited Total:	\$148,219.00
								Schoolwide Total:	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Montessori Certification	Yes	LEA-wide	English Learners Low Income	All Schools	\$15,000.00	
1	1.2	Structured Literacy	Yes	LEA-wide	English Learners Low Income	All Schools	\$35,000.00	
1	1.4	Professional Learning	Yes	LEA-wide	English Learners Low Income	All Schools	\$10,000.00	
1	1.5	EL Supports	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners	All Schools	\$148,219.00	
1	1.6	Reflex Math	Yes	LEA-wide	English Learners Low Income	All Schools	\$3,000.00	
1	1.7	I-Ready	Yes	LEA-wide	English Learners Low Income	All Schools	\$30,000.00	
1	1.8	Development of a robust PE program	Yes	LEA-wide	English Learners Low Income		\$2,000.00	
2	2.3	Technology	Yes	LEA-wide	Low Income		\$0.00	
3	3.2	Community Partnerships	Yes	LEA-wide	English Learners Foster Youth	All Schools	\$1,500.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
					Low Income			
3	3.3	Staff Social and Emotional Wellbeing				All Schools	\$2,000.00	
3	3.4	Field Trips	Yes	LEA-wide	Low Income		\$95,000.00	

2025-26 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$562,082.00	\$563,465.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Montessori Certification	Yes	\$30,500.00	\$29,700.00
1	1.2	Structured Literacy	Yes	\$35,000.00	\$34,665.00
1	1.4	Professional Learning	Yes	\$10,000.00	\$12,720.00
1	1.5	EL Supports	Yes	\$179,992.00	\$184,000.00
1	1.6	Reflex/Singapore Math	Yes	\$5,000.00	\$5,790
1	1.7	I-Ready	Yes	\$30,000.00	\$30,000.00
1	1.8	Development of a robust PE program	Yes	\$17,000.00	\$12,000.00
2	2.1	Montessori Materials	No	\$10,000.00	\$10,000.00
2	2.2	Facility Improvements	No	\$145,000.00	\$145,000.00
2	2.3	Technology	Yes	\$0.00	\$0.00
3	3.1	Learning Center Events	No		

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	3.2	Community Partnerships	Yes	\$2,590.00	\$2590.00
3	3.3	Staff Social and Emotional Wellbeing	No	\$2,000.00	\$2,000.00
3	3.4	Field Trips	Yes	\$95,000.00	\$95,000.00

2025-26 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
339,719	\$405,082.00	\$405,082.00	\$0.00	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Montessori Certification	Yes	\$30,500.00	\$32,280.00		
1	1.2	Structured Literacy	Yes	\$35,000.00	\$34,665.00		
1	1.4	Professional Learning	Yes	\$10,000.00	\$12,720.00		
1	1.5	EL Supports	Yes	\$179,992.00	\$179,992.00		
1	1.6	Reflex/Singapore Math	Yes	\$5,000.00	\$5790.00		
1	1.7	I-Ready	Yes	\$30,000.00	\$30,000.00		
1	1.8	Development of a robust PE program	Yes	\$17,000.00	\$12,045.00		
2	2.3	Technology	Yes	\$0.00	0	0	0
3	3.2	Community Partnerships	Yes	\$2,590.00	\$2,590.00		
3	3.4	Field Trips	Yes	\$95,000.00	\$95,000.00		

2025-26 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
8,383,665	339,719	0	4.052%	\$405,082.00	0.000%	4.832%	\$0.00	0.000%

Local Control and Accountability Plan Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[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 Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (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.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. 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 Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners 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 the nature of some LCAP template sections 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, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

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 must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners 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 tool for engaging educational partners.

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 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statutes of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners 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 educational partners 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 educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 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 and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 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 document. Additionally, the beginning of each template section includes information emphasizing the purpose that 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 present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
 - If the LEA has unexpended LREBG funds the LEA must provide the following:
 - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
 - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
 - An explanation of how the action is aligned with the allowable uses of funds identified in [EC Section 32526\(c\)\(2\)](#); and
 - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by [EC Section 32526\(d\)](#).
 - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the [LREBG Program Information](#) web page.
 - Actions may be grouped together for purposes of these explanations.
 - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
 - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32627(d), to provide the information identified above or to include actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

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

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

- Identify the schools within the LEA that have 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.

- 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

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

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, 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 engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

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

Requirements

Requirements

School districts and COEs: [EC Section 52060\(g\)](#) and [EC Section 52066\(g\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. 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.

Charter schools: [EC Section 47606.5\(d\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

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. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062](#);
 - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see [Education Code Section 52068](#); and
- For charter schools, see [Education Code Section 47606.5](#).

- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, 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 educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is 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 target 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 students
 - Analysis of effectiveness of the specific actions to achieve the goal
 - Analysis of material differences in expenditures
 - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
 - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners 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 must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners 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 must 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. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. 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, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

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.
 - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **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.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

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.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school’s educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school’s educators.
 - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
 - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school’s educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
 - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: [EC Section 42238.024\(b\)\(1\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad 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.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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

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 educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- 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 local indicator self-reflection tools within the Dashboard.
- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
 - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
 - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.
- **Required metrics for actions supported by LREBG funds:** To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.
 - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> • Enter the metric number.
Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
 - Use the most recent data associated with the 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 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (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.
 - Indicate the school year to which the baseline data applies.
 - The baseline data must remain unchanged throughout the three-year LCAP.
 - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
 - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
 - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

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

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 . Leave blank until then.	Enter information in this box when completing the LCAP for 2026–27 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 and 2026–27 . Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
 - Include a discussion of relevant challenges and successes experienced with the implementation process.
 - This discussion 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.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
 - 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 educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
 - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

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

- 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.
 - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
 - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
 - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased 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 contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

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.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
 - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
 - Professional development for teachers.
 - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
 - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
 - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
 - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to [EC Section 32526\(d\)](#). For information related to the required needs assessment please see the Program Information tab on the [LREBG](#)

[Program Information](#) web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the [California Statewide System of Support LREBG Resources](#) web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32627(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in [EC Section 32526\(c\)\(2\)](#).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
 - Identify the action as an LREBG action;
 - Include an explanation of how research supports the selected action;
 - Identify the metric(s) being used to monitor the impact of the action; and
 - Identify the amount of LREBG funds being used to support the action.

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

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, 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 educational partners 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.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 CCR Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

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 identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all 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 increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated 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).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA’s 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).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, 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 increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA’s needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.
- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

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

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming 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.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- 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 transitional kindergarten through grade five), 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."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **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).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
 - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **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.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
 - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to EC Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
 - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
 - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Coversheet

Consideration of FY26-27 Adopted Budget

Section: XII. Action Items for Community Montessori
Item: D. Consideration of FY26-27 Adopted Budget
Purpose: Vote
Submitted by: Doug Miller
Related Material: CommunityMontessori_AdoptedBudget_2026.pdf

BACKGROUND:

Charter Schools must submit their budgets to the chartering authority and their county office of education, Education code 47604.33:

- By July 1st for adopted budget.
- On or before December 15th, for first interim financial report. This report shall reflect changes through October 31st
- On or before March 15, a second interim financial report. This report shall reflect changes through January 31st
- On or before September 15th, a final unaudited report for the full prior year.

The FY 2026 -2027 Adopted Budget projects a surplus of \$1,736,303.00

Financial Impact: \$10,942,050.00

RECOMMENDATION:

Approve the FY 2026-2027 Adopted Budget

1. Beginning Fund Balance/Net Position												
a. As of July 1	9791	6,110,896	105,895	6,216,790	-	-	-	6,448,119	108,574	6,556,692	339,902	5.47%
b. Adjustments/Restatements	9793, 9795	-	-	-	-	-	-	-	-	-	-	-
c. Adjusted Beginning Fund Balance /Net Position		6,110,896	105,895	6,216,790	-	-	-	6,448,119	108,574	6,556,692	339,902	5.47%
2. Ending Fund Balance /Net Position, June 30 (E+F1c)												
		6,448,119	108,574	6,556,692	-	-	-	8,173,461	119,535	8,292,995	1,736,303	26.48%
Components of Ending Fund Balance (Modified Accrual Basis only)												
a. Nonspendable												
1. Revolving Cash (equals Object 9130)	9711	-	-	-	-	-	-	-	-	-	-	-
2. Stores (equals Object 9320)	9712	-	-	-	-	-	-	-	-	-	-	-
3. Prepaid Expenditures (equals Object 9330)	9713	-	-	-	-	-	-	-	-	-	-	-
4. All Others	9719	-	-	-	-	-	-	-	-	-	-	-
b. Restricted	9740	-	-	-	-	-	-	-	-	-	-	-
c. Committed												
1. Stabilization Arrangements	9750	-	-	-	-	-	-	-	-	-	-	-
2. Other Commitments	9760	-	-	-	-	-	-	-	-	-	-	-
d. Assigned	9780	-	-	-	-	-	-	-	-	-	-	-
e. Unassigned/Unappropriated												
1. Reserve for Economic Uncertainties	9789	-	-	-	-	-	-	-	-	-	-	-
2. Unassigned/Unappropriated Amount	9790M	-	-	-	-	-	-	-	-	-	-	-
3. Components of Ending Net Position (Accrual Basis only)												
a. Net Investment in Capital Assets	9796	4,761,299	-	4,761,299	-	-	-	4,913,744	-	4,913,744	152,445	3.20%
b. Restricted Net Position	9797	1,000,000	108,574	1,108,574	-	-	-	1,000,000	119,535	1,119,535	10,961	0.99%
c. Unrestricted Net Position	9790A	686,820	-	686,820	-	-	-	2,259,717	-	2,259,717	1,572,897	229.01%
G. ASSETS												
1. Cash												
a. In County Treasury	9110	2,900,775	108,574	3,009,349	-	-	-	2,851,717	119,535	2,971,252	(38,097)	-1.27%
b. Fair Value Adjustment to Cash in County Treasury	9111	-	-	-	-	-	-	-	-	-	-	-
c. In Banks	9120	602,148	-	602,148	-	-	-	600,000	-	600,000	(2,148)	-0.36%
d. In Revolving Fund	9130	-	-	-	-	-	-	-	-	-	-	-
e. With Fiscal Agent/Trustee	9135	-	-	-	-	-	-	-	-	-	-	-
f. Collections Awaiting Deposit	9140	-	-	-	-	-	-	-	-	-	-	-
2. Investments												
3. Accounts Receivable												
4. Due from Grantor Governments												
5. Stores												
6. Prepaid Expenditures (Expenses)												
7. Other Current Assets												
8. Lease Receivable												
9. Capital Assets (accrual basis only)												
10. TOTAL ASSETS												
		9,879,732	108,574	9,988,306	-	-	-	10,173,461	119,535	10,292,996	304,690	3.05%
H. DEFERRED OUTFLOWS OF RESOURCES												
1. Deferred Outflows of Resources												
2. TOTAL DEFERRED OUTFLOWS												
I. LIABILITIES												
1. Accounts Payable												
2. Due to Grantor Governments												
3. Current Loans												
4. Unearned Revenue												
5. Long-Term Liabilities (accrual basis only)												
6. TOTAL LIABILITIES												
		3,431,613	-	3,431,613	-	-	-	2,000,000	-	2,000,000	(1,431,613)	-41.72%
J. DEFERRED INFLOWS OF RESOURCES												
1. Deferred Inflows of Resources												
2. TOTAL DEFERRED INFLOWS												
K. FUND BALANCE /NET POSITION												
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J)												
EFB		6,448,119	108,574	6,556,693	-	-	-	8,173,461	119,535	8,292,996	1,736,303	26.48%
(must agree with Line F2)												

Coversheet

Consideration of Proposition 28 Annual Report

Section: XIII. Action Items for Dimensions Collaborative School
Item: A. Consideration of Proposition 28 Annual Report
Purpose: Vote
Submitted by: Doug Miller
Related Material: DCS AnnualReport FY25-26.pdf

BACKGROUND:

On November 8, 2022, California voters approved Proposition 28: The Arts and Music in Schools (AMS) Funding Guarantee and Accountability Act. The measure required the state to establish a new, ongoing program supporting arts instruction in schools beginning in 2023–24.

The legislation allocates 1 percent of the kindergarten through grade twelve (K–12) portion of the Proposition 98 funding guarantee provided in the prior fiscal year, excluding funding appropriated for the AMS education program. Local educational agencies (LEAs) with 500 or more students are required to ensure that at least 80 percent of AMS funds to be expended are used to employ certificated or classified employees to provide arts education program instruction. The remaining funds must be used for training, supplies and materials, and arts educational partnership programs, with no more than 1 percent of funds received to be used for an LEA's administrative expenses.

California Education Code (EC) Section 8820(g)(4)—Local Educational Agencies (LEAs) must have this annual report board approved, submitted to the California Department of Education (CDE), and posted to the LEA's website.

Financial Impact:

RECOMMENDATION:

Approve the FY 2025-2026 Proposition 28 Annual Report

Proposition 28: Arts and Music in Schools Funding Annual Report Fiscal Year 2025-26

Name: Dimensions Collaborative
 CDS Code: 3710371-0137752
 Charter School Number: 1946
 Allocation Year: 2025-26, 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

Dimensions Collaborative was able to hire a full time Educational Facilitator (EF) with a single subject credential in art to teach art to students in grades TK-12. This EF is creating, coordinating, and implementing arts activities which align with Dimensions philosophy and practices. The addition of this EF has allowed us to offer art classes to all our students throughout San Diego County. Students have been introduced to various artists and art styles, as well as different mediums to create art (sketching, painting, ceramics, etc.). A wide variety of art supplies were purchased and over 170 pieces of student artwork were submitted to the San Diego Fair.

- 2. Number of full-time equivalent teachers (certificated).** 0.0
- 3. Number of full-time equivalent personnel (classified).** 0.3
- 4. Number of full-time equivalent teaching aides.** 0.0
- 5. Number of students served.** 520
- 6. Number of school sites providing arts education.** 0

Date of Approval by Governing Board/Body 6/26/2026 12:00:00 AM

Annual Report Data URL
<https://www.myelement.org/public-notice>

Submission Date 5/19/2026 11:11:23 AM

Coversheet

Consideration of FY25-26 EPA Resolution

Section: XIII. Action Items for Dimensions Collaborative School
Item: B. Consideration of FY25-26 EPA Resolution
Purpose: Vote
Submitted by: Doug Miller
Related Material: EPA Resolution DCS FY25-26.pdf
DCS EPA FY25-26.pdf

BACKGROUND:

On November 6, 2012 voters in the State of California approved Proposition 30.

Pursuant to Article XIII, Section 36 of the California Constitution, school districts, county offices of education, and community college districts are required to determine how the moneys received from the Education Protection Account are spent in the school or schools within in jurisdiction, provided that the governing board makes the spending determinations in an open session of a public meeting.

Financial Impact: \$103,794.00

RECOMMENDATION:

Adopt the FY25-26 Education Protection Account resolution

RESOLUTION REGARDING THE EDUCATION PROTECTION ACCOUNT

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

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

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

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

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

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

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

WHEREAS, a community college district, county office of education, school district, or charter school shall have the sole authority to determine how the monies

received from the Education Protection Account are spent in the school or schools within its jurisdiction;

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

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

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

WHEREAS, the annual independent financial and compliance audit required of community college districts, county offices of education, school districts and charter schools shall ascertain and verify whether the funds provided from the Education Protection Account have been properly disbursed and expended as required by Article XIII, Section 36 of the California Constitution;

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

NOW, THEREFORE, IT IS HEREBY RESOLVED:

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

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

DATED: June 26, 2026

Board Member

Board Member

Board Member

Board Member

Board Member

Board Member

ESP-CA
Dimensions Collaborative School
Income Statement
July 1, 2025- June 30, 2026

Financial Row	Amount
Ordinary Income/Expense	
Income	
8000 - Revenue	
8010 - Principal Apportionment	
8012 - Education Protection Account Entitlement	\$103,794.00
Total - 8010 - Principal Apportionment	\$103,794.00
Total - 8000 - Revenue	\$103,794.00
Total - Income	\$103,794.00
Gross Profit	\$103,794.00
Expense	
1000 - Certificated Salaries	
1100 - Teachers Salaries	\$103,794.00
Total - 1000 - Certificated Salaries	\$103,794.00
Total - Expense	\$103,794.00
Net Ordinary Income	\$0.00
Net Income	\$0.00

Coversheet

Consideration of the 26-27 Local Control and Accountability Plan (LCAP)

Section: XIII. Action Items for Dimensions Collaborative School
Item: C. Consideration of the 26-27 Local Control and Accountability Plan (LCAP)
Purpose: Vote
Submitted by: Terri Novacek
Related Material: DCS_26.27 LCAP.pdf

BACKGROUND:

A public hearing was held on May 22, 2026.

Summary: 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. Charter schools are encouraged to follow a process like that required for a school district, which is to hold an initial public hearing to solicit recommendations and comments on the LCAP and annual update, followed by a subsequent public meeting for adoption of the plan, before submitting the adopted LCAP to the charter authorizer.

RECOMMENDATION:

Approve 26-27 Local Control and Accountability Plan (LCAP).

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Dimensions Collaborative

CDS Code: 37103710137752

School Year: 2026-27

LEA contact information:

Paul Johnson

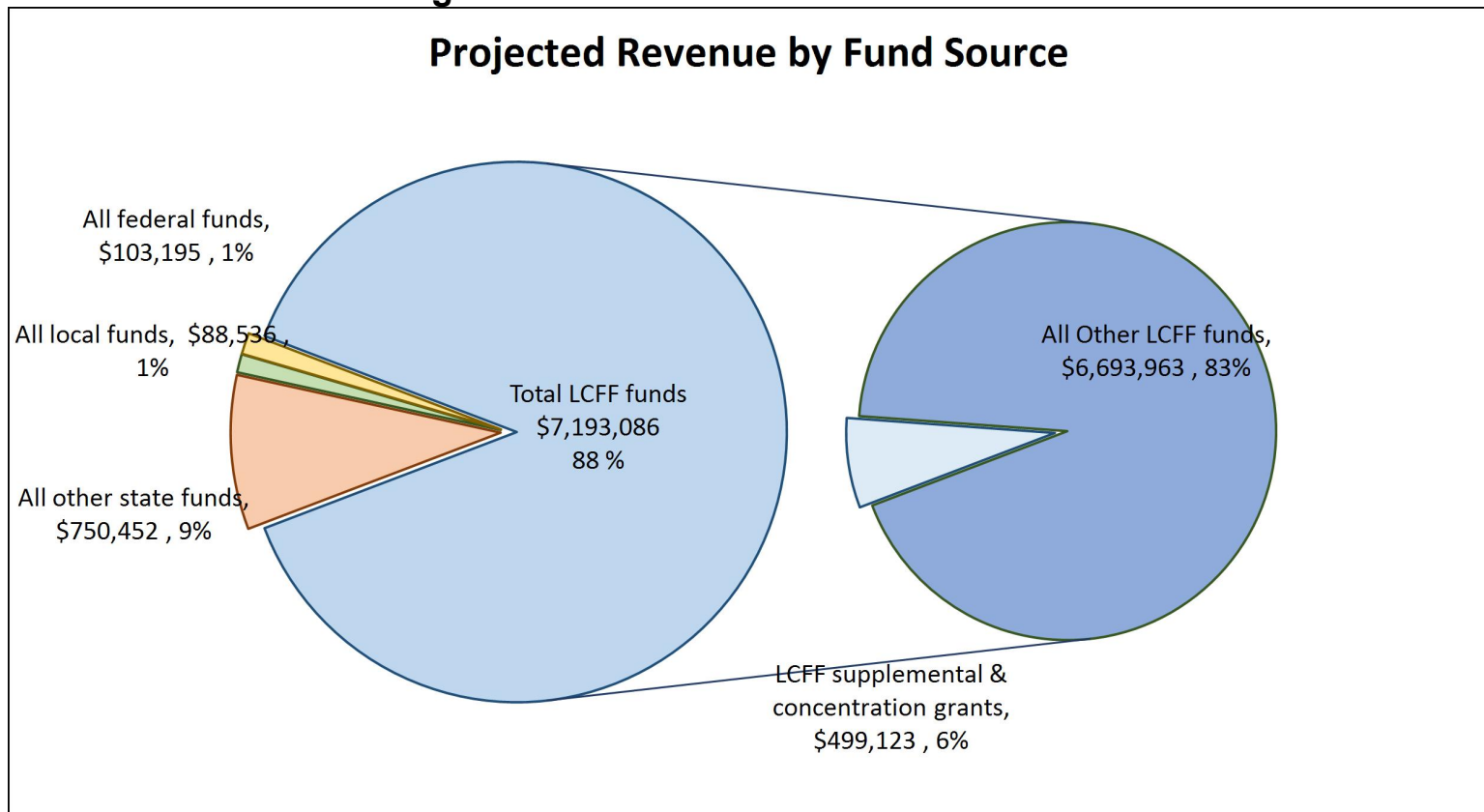
School Director

pjohnson@dimensions.org

(619) 495-9862

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 2026-27 School Year

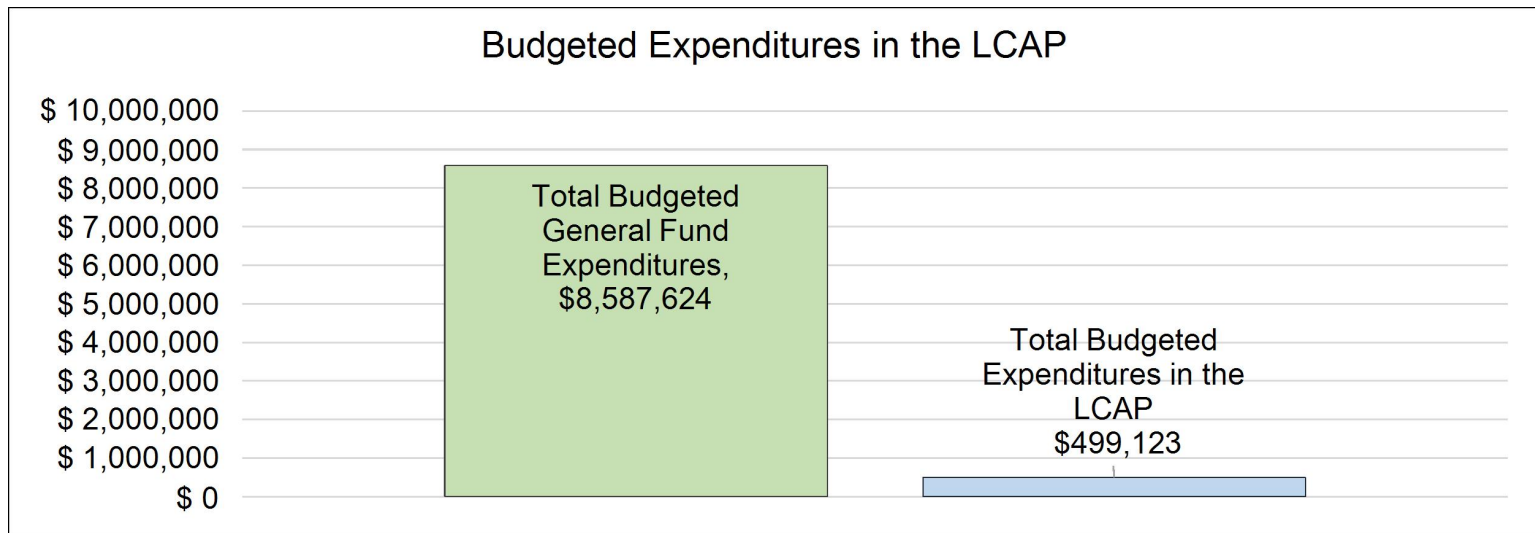


This chart shows the total general purpose revenue Dimensions Collaborative expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Dimensions Collaborative is \$8,135,269, of which \$7,193,086 is Local Control Funding Formula (LCFF), \$750,452 is other state funds, \$88,536 is local funds, and \$103,195 is federal funds. Of the \$7,193,086 in LCFF Funds, \$499,123 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 Dimensions Collaborative plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Dimensions Collaborative plans to spend \$8,587,624 for the 2026-27 school year. Of that amount, \$499,123 is tied to actions/services in the LCAP and \$8,088,501 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

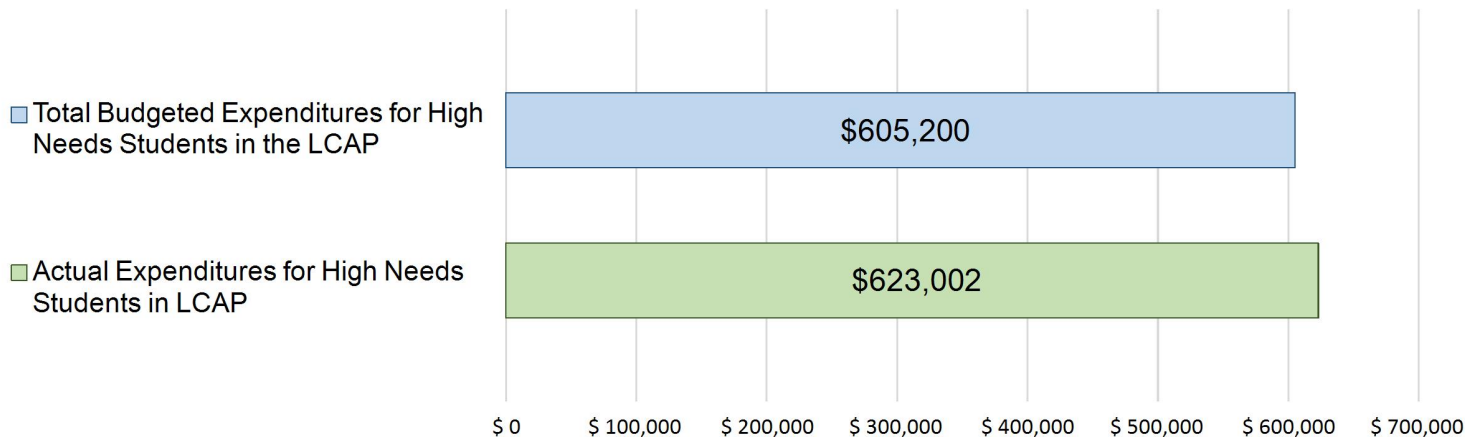
Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Dimensions Collaborative is projecting it will receive \$499,123 based on the enrollment of Foster Youth, English learner, and low-income students. Dimensions Collaborative must describe how it intends to increase or improve services for high needs students in the LCAP. Dimensions Collaborative plans to spend \$480,049 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 2025-26

Prior Year Expenditures: Increased or Improved Services for High Needs Students



This chart compares what Dimensions Collaborative budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Dimensions Collaborative estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Dimensions Collaborative's LCAP budgeted \$605,200 for planned actions to increase or improve services for high needs students. Dimensions Collaborative actually spent \$623,002 for actions to increase or improve services for high needs students in 2025-26.

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
Dimensions Collaborative	Paul Johnson School Director	pjohnson@dimensions.org (619) 495-9862

Plan Summary [2026-27]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Dimensions Collaborative School (DCS) is a non-classroom based independent study K-12 charter school sponsored by the San Diego County Office of Education serving approximately 550 students in San Diego County. The school was established in 2018 to meet the needs of students whose families desire flexibility in educational options and choose to home-school their children. The parents and students consistently report that they are supported in choosing the most appropriate curriculum, instructional methodology and elective opportunities by the Educational Facilitators (credentialed teachers).

The Educational Facilitators (EF) work with the students and parents to plan the curriculum according to the student's academic progress and a Learning Styles Profile. The course work is then aligned with the Common Core State Standards and, at the high school level, the UC approved course descriptions. The curriculum materials are selected by the EF, parents, and students to reflect the goals of the students and the school-wide Learning Outcomes: Mastery, Autonomy, and a sense of Purpose.

Learning Centers are available at multiple locations throughout the county to provide access to highly qualified instructors for direct instruction, wet labs, electives, and socialization/elective opportunities such as Robotics, Art, Music, Theater, tutoring, Counseling, Special Education Services, and more.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Overall Math Performance on standardized assessments was low at all grade levels, with only 36% meeting or exceeding standards in Mathematics on the CAASPP assessment. Due to the low mathematics scores, DCS has implemented a Math Matters program of focused interventions and instructions for all students using iReady, Keys To Math, and other locally identified intervention curriculum. Growth has been seen in all grade levels, but general ed interventions are still required for a large number of students, especially in 8th grade and high school level math.

Local assessment data also shows students struggling to make progress in mathematics. Dashboard data shows that DCS's math achievement is similar to students at the state and county levels,

The most recent CA Dashboard showed Socioeconomically Disadvantaged students, students with disabilities and Hispanic students all scored low on the performance level. Tier two interventions were put in place for students below grade standards.

The "Dimensions Collaborative" charter school, located in Escondido, CA, serves a vibrant K-12 student body and showcases robust operational management coupled with a supportive educational environment.

Operational Strengths

Chronic Absenteeism and Suspension Rates: The school excels with remarkably low rates of absenteeism and suspensions, indicating successful strategies that promote student engagement and maintain a nurturing school climate.

Compliance with Local Indicators: Dimensions Collaborative meets or exceeds standards across critical areas such as teacher qualifications, academic standards implementation, and family engagement, reflecting its strong administrative foundation and commitment to quality education.

Demographic Insights

Socioeconomic Challenges: More than half of the student population comes from socioeconomically disadvantaged backgrounds, which may hinder access to external educational resources and affect academic performance.

Diversity Aspects: With a growing percentage of English learners and specific demographic traits, the school has unique opportunities to tailor its resources and teaching strategies to meet diverse educational needs effectively.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

N/A

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.

N/A

Support for Identified Schools

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

N/A

Monitoring and Evaluating Effectiveness

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

N/A

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
All DCS staff, students, and parents	Educational Partner input is actively solicited via a variety of channels such as surveys, social media, all-calls, emails, texting, newsletters, orientations, site meetings and activities, etc. Educational Partners were involved in adjustments to school branding, logo, MTSS expectations, SLOs, etc. Educational Partners have also been actively involved in decision-making related to shifts in programming to more accurately reflect the mission and vision in the charter. Input has been solicited via survey, individual parent meetings, website, social media, etc. DCS has intentionally aligned all site plans to address student engagement, learning, and achievement, so in developing each specific plan, educational partners are invited to virtual and, when appropriate, in-person meetings. Input from students and families is frequently solicited formally through surveys and planned meetings, and when students are interacting with their teachers and other staff members in academic settings. Significant expansion of opportunities for families, students, and other stakeholders to engage with the learning community was implemented to assist the development of future plans.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

When the draft goals were shared with educational partners, the feedback was overwhelmingly positive in support of the draft goals. Staff shared some recommended action items in order to meet the goals and these action items were incorporated into the LCAP.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	<p>Support for High-Quality Teachers and Program Implementation</p> <p>Develop high-quality teachers in their implementation of a cohesive, aligned, equitable, and articulated standards-based instructional program, leading to self-directed students capable of achieving proficiency in California state standards, and preparedness for high school, college, and career.</p>	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

To continue the work of increasing educator efficacy in the areas of instruction, implementation of standards-based curriculum, and meaningful assessment to drive instruction. Including differentiated instruction, and accommodations and modification when appropriate with clear and consistent protocols for supporting students in their learning. The most recent California Department of Education Dataquest info shows 48.47% of students meeting or exceeding state standards in ELA and 33.18% meeting or exceeding standards in Mathematics. Due to the low mathematics scores, DCS has implemented a Math Matters program of focused interventions and instructions for all students. Growth has been seen in all grade levels, but general ed interventions are still required for a large number of students, especially in 8th grade and high school level math.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	iReady ELA Diagnostics: % of students at or above grade level (whole school)	ELA: Grade 3 = 80% Grade 4 = 73% Grade 5 = 64% Grade 6 = 64% Grade 7 = 59% Grade 8 = 56% Grade 9 = 51% Grade 10 = 51% Grade 11 = 52%	ELA: Grade 3 = 80% Grade 4 = 55% Grade 5 = 66% Grade 6 = 46% Grade 7 = 46% Grade 8 = 57% Grade 9 = 60% Grade 10 = 67% Grade 11 = 47%	ELA: Grade 3 = 72% Grade 4 = 62% Grade 5 = 50% Grade 6 = 61% Grade 7 = 65% Grade 8 = 47% Grade 9 = 55% Grade 10 = 57% Grade 11 = 71%	5% growth at all grade levels	Current Difference from Baseline: Grade 3: -8 percentage points Grade 4: -11 percentage points Grade 5: -14 percentage points Grade 6: -3 percentage points Grade 7: +6 percentage points Grade 8: -9 percentage points Grade 9: +4 percentage points Grade 10: +6 percentage points Grade 11: +19 percentage points
1.2	iReady Math Diagnostics: % of students at or above grade level (whole school)	Math: Grade 3 = 58% Grade 4 = 61% Grade 5 = 52% Grade 6 = 54% Grade 7 = 31% Grade 8 = 44% Grade 9 = 37% Grade 10 = 45% Grade 11 = 27%	Math: Grade 3 = 53% Grade 4 = 42% Grade 5 = 60% Grade 6 = 50% Grade 7 = 41% Grade 8 = 39% Grade 9 = 57% Grade 10 = 52% Grade 11 = 53%	Math: Grade 3 = 60% Grade 4 = 36% Grade 5 = 50% Grade 6 = 51% Grade 7 = 60% Grade 8 = 40% Grade 9 = 68% Grade 10 = 60% Grade 11 = 42%	5% growth at all grade levels	Current Difference from Baseline: Grade 3: +2 percentage points Grade 4: -25 percentage points Grade 5: -2 percentage points Grade 6: -3 percentage points Grade 7: +29 percentage points Grade 8: -4 percentage points

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						Grade 9: +31 percentage points Grade 10: +15 percentage points Grade 11: +15 percentage points
1.3	CAASPP ELA Assessments: % of student who met or exceeded the standard (whole school + unduplicated breakdown)	48.7% Met or exceeded Standards Socio-economically disadvantaged (SED)- Grade 3 = 31% Grade 4 = 46% Grade 5 = 33% Grade 6 = 39% Grade 7 = 57% Grade 8 = 36% Grade 9 = null Grade 10 = null Grades 11 = 62% English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 20% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 50%	44% Met or exceeded Standards Socio-economically disadvantaged (SED)- Grade 3 = 33% Grade 4 = 33% Grade 5 = 26% Grade 6 = 18% Grade 7 = 48% Grade 8 = 53% Grade 9 = null Grade 10 = null Grades 11 = 67% English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 0%	48% Met or exceeded Standards Socio-economically disadvantaged (SED)- Grade 3 = 33% Grade 4 = 27% Grade 5 = 50% Grade 6 = 27% Grade 7 = 31% Grade 8 = 47% Grade 9 = null Grade 10 = null Grades 11 = 64% English Language Learners (ELL)- Grade 3 = 100% Grade 4 = 0% Grade 5 = null Grade 6 = null Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 0%	55% meet or exceed standards	Whole school performance increased from 48.7% to 48%, representing a 0.7 percentage point decrease from baseline. Whole school performance remained relatively stable, decreasing slightly from 48.7% to 48% met or exceeded standards.

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.4	CAASPP Math Assessments: % of students who met or exceeded the standard (whole school + unduplicated breakdown)	<p>33% Met or exceeded standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 31% Grade 4 = 38% Grade 5 = 8% Grade 6 = 28% Grade 7 = 21% Grade 8 = 21% Grade 9 = null Grade 10 = null Grades 11 = 0%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 0%</p>	<p>33% Met or exceeded Standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 27% Grade 4 = 28% Grade 5 = 32% Grade 6 = 18% Grade 7 = 33% Grade 8 = 35% Grade 9 = null Grade 10 = null Grades 11 = 27%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 0%</p>	<p>37% Met or exceeded Standards</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 13% Grade 4 = 36% Grade 5 = 33% Grade 6 = 45% Grade 7 = 20% Grade 8 = 32% Grade 9 = null Grade 10 = null Grades 11 = 8%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = null Grade 6 = null Grade 7 = 0% Grade 8 = 0% Grade 9 = null Grade 10 = null Grades 11 = 0%</p>	40% meet or exceed standards	<p>Whole school performance increased from 33% to 37%, representing a 4 percentage point increase from baseline.</p> <p>Whole school performance improved from 33% to 37% met or exceeded standards, representing a 4 percentage point increase from baseline.</p>
1.5	Suspension Rates: % of students receiving suspensions	0.2% Suspension Rate	0.3% suspension rate	0	.5% Suspension rate	No Change
1.6	Expulsion Rate: % of expelled students	0% Expulsion Rate	0% Expulsion Rate	0	0% Expulsion rate	No Change
1.7	Graduation Rate: % of students graduating	87.5% Graduated	97.2%	90%	95% Graduation Rate	Graduation rate increased from 87.5% to 90%,

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						representing a 2.5 percentage point increase from baseline.
1.8	A-G Completion Rate through transcript review	14.29% completed A-G requirements	25%	28%	25% Complete A-G requirements	+3%
1.9	CTE Completion Rate		At the end of the 24-25 academic year DCS will have its first CTE completer.	31%	25% CTE Completion rate	Above targeted outcome
1.10	<p>English Learner Progress</p> <p>Continually increase the proficiency rates of English Learners with the ultimate goal of achieving and maintaining high proficiency levels.</p>	57.1% Making progress towards English language proficiency	26% considered well developed on the ELPAC	24% considered well developed on the ELPAC	70% making progress towards English language proficiency	Baseline data indicated that 57.1% of English Learners were making progress toward English language proficiency. Since that time, the school transitioned to using a different measurement metric focused on the percentage of students considered “well developed” on the ELPAC. Using the updated metric, performance changed from 26% to 24% well developed, representing a 2 percentage point

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						decrease from the prior year.
1.11	Teacher Credential and Assignment Compliance.	100% of teachers appropriately credentialed and assigned	100% of teachers appropriately credentialed and assigned	100% of teachers appropriately credentialed and assigned	100% of teachers appropriately credentialed and assigned	Maintained
1.12	Comprehensive Access to Instructional Materials.	100% of students have access to board adopted materials and instructional supplies	100% of students have access to board adopted materials and instructional supplies	100% of students have access to board adopted materials and instructional supplies	100% of students have access to board adopted materials and instructional supplies	Maintained
1.13	The percentage of English learner students who are provided access to both the state standards and English Language Development (ELD) standards.	100% of English learners had access to the ELD state standards	100% of English learners had access to the ELD state standards	100% of English learners had access to the ELD state standards	100% of English learners had access to the ELD state standards	Maintained
1.14	The percentage of students enrolled in a diverse range of subjects, as evidenced by their report cards.	100% of students have access to a broad course of study	100% of students have access to a broad course of study	100% of students have access to a broad course of study	100% of students have access to a broad course of study	Maintained
1.15	% of Socio Economically Disadvantaged student that meet or exceed CAASPP Scores	43%- ELA 23%- Math Average: 33%	39%- ELA 29%- Math Average: 34%	40%- ELA 26%- Math Average: 33%	45%- ELA 30%- Math Average: 35%	Socio-economically disadvantaged student performance remained relatively stable overall. Average performance changed from 33% at baseline to 33%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						<p>in Year 2, reflecting no overall percentage point change from baseline.</p> <p>In ELA, performance decreased slightly from 43% to 40% (-3 percentage points), while Math performance increased from 23% to 26% (+3 percentage points).</p>
1.16	CAASPP ELA Results for EL Students	13%- CAASPP ELA Results for EL Students	0%- CAASPP ELA Results for EL Students	10%- CAASPP ELA Results for EL Students	Grow 5% or more each year and could be adjusted based on population size and mobility.	+10%
1.17	CAASPP Math Results for EL Students	0%- CAASPP Math Results for EL Students	0%- CAASPP ELA Results for EL Students	0%- CAASPP ELA Results for EL Students	Grow 5% or more each year and could be adjusted based on population size and mobility.	Maintained
1.18	I-Ready ELA Diagnostics Unduplicated Students	<p>(Winter assessment)- On or above grade level</p> <p>Socio-economically disadvantaged (SED)- Grade 3 = 69% Grade 4 = 67% Grade 5 = 25%</p>	<p>Socio-economically disadvantaged (SED)- Grade 3 = 92% Grade 4 = 22% Grade 5 = 60% Grade 6 = 38%</p>	<p>Socio-economically disadvantaged (SED)- Grade 3 = 64% Grade 4 = 57% Grade 5 = 54% Grade 6 = 39%</p>	Grow 5% or more each year and could be adjusted based on population size and mobility.	Results for unduplicated student groups showed mixed performance across grade levels when

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		Grade 6 = 19% Grade 7 = 50% Grade 8 = 75% Grade 9 = 50% Grade 10 = 43% Grades 11 = 36% English Language Learners (ELL)- Grade 3 = 100% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = 0% Grade 10 = 0% Grades 11 = 0%	Grade 7 = 38% Grade 8 = 47% Grade 9 = 44% Grade 10 = 58% Grades 11 = 20% English Language Learners (ELL)- Grade 3 = 50% Grade 4 = 0% Grade 5 = null Grade 6 = null Grade 7 = 0% Grade 8 = 100% Grade 9 = 25% Grade 10 = 25% Grades 11 = 0%	Grade 7 = 46% Grade 8 = 41% Grade 9 = 50% Grade 10 = 60% Grades 11 = 83% English Language Learners (ELL)- Grade 3 = 17% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 40% Grade 9 = null Grade 10 = 50% Grades 11 = 100%		compared to baseline data. Among socio-economically disadvantaged (SED) students, notable gains were observed in Grade 11 (+47 percentage points), Grade 10 (+17 percentage points), and Grade 5 (+29 percentage points), while declines occurred in Grade 8 (-34 percentage points) and Grade 3 (-5 percentage points). English Learner (ELL) performance varied significantly across grade levels due to small student populations, with increases observed in Grades 8, 10, and 11.
1.19	I-Ready Math Diagnostics Unduplicated Students	(Winter assessment)- On or above grade level	Socio-economically	Socio-economically	Grow 5% or more each year and could be adjusted	Results for unduplicated student groups

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		<p>Socio-economically disadvantaged (SED)- Grade 3 = 57% Grade 4 = 47% Grade 5 = 19% Grade 6 = 19% Grade 7 = 32% Grade 8 = 50% Grade 9 = 33% Grade 10 = 39% Grades 11 = 20%</p> <p>English Language Learners (ELL)- Grade 3 = 100% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 0% Grade 9 = 0% Grade 10 = 0% Grades 11 = 50%</p>	<p>disadvantaged (SED)- Grade 3 = 92% Grade 4 = 22% Grade 5 = 60% Grade 6 = 38% Grade 7 = 38% Grade 8 = 47% Grade 9 = 44% Grade 10 = 58% Grades 11 = 20%</p> <p>English Language Learners (ELL)- Grade 3 = 50% Grade 4 = 0% Grade 5 = null Grade 6 = null Grade 7 = 0% Grade 8 = 100% Grade 9 = 25% Grade 10 = 25% Grades 11 = 0%</p>	<p>disadvantaged (SED)- Grade 3 = 35% Grade 4 = 39% Grade 5 = 43% Grade 6 = 22% Grade 7 = 54% Grade 8 = 41% Grade 9 = 57% Grade 10 = 75% Grades 11 = 25%</p> <p>English Language Learners (ELL)- Grade 3 = 0% Grade 4 = 0% Grade 5 = 0% Grade 6 = 0% Grade 7 = 0% Grade 8 = 40% Grade 9 = null Grade 10 = 75% Grades 11 = 100%</p>	<p>based on population size and mobility.</p>	<p>demonstrated overall mixed growth patterns compared to baseline performance.</p> <p>Among socio-economically disadvantaged (SED) students, substantial gains were observed in Grade 10 (+36 percentage points), Grade 9 (+24 percentage points), Grade 7 (+22 percentage points), and Grade 5 (+24 percentage points).</p> <p>Declines were observed in Grade 3 (-22 percentage points) and Grade 4 (-8 percentage points).</p> <p>English Learner (ELL) performance fluctuated across grade levels due to small subgroup sizes, with gains observed in</p>

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
						Grades 8, 10, and 11 during Year 2.

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Goal 1 was implemented with moderate overall effectiveness during the 2025-26 school year, with measurable successes in several academic and college/career readiness indicators, while continued challenges remained in achieving consistent growth across all grade levels and student groups.

The school demonstrated positive outcomes in multiple areas, including increases in graduation rates (87.5% to 90%), A-G completion rates (14.29% to 25%), and CAASPP Math performance (33% to 37% meeting or exceeding standards). Several upper-grade cohorts demonstrated substantial growth in i-Ready ELA and Math performance, particularly in Grades 7–11. CTE completion outcomes also exceeded the established target.

The school maintained full compliance with credentialing requirements, instructional material access, broad course access, and English Language Development (ELD) access for English Learners.

While several student groups demonstrated meaningful growth, academic performance remained inconsistent across some grade levels, particularly in elementary and middle school cohorts. English Learner performance data also remained difficult to interpret longitudinally due to changes in the measurement metric used between baseline and current years.

Overall, the school made measurable progress toward Goal 1 priorities while identifying areas requiring continued refinement and targeted academic support moving forward.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- 1.1 Increased number of high schoolers needing supports
- 1.2 Increase in SSTs and intervention supports
- 1.3 -Smaller expenditure based on the actual number of lead facilitators
- 1.6 Decrease in salary expenditure

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

The actions associated with Goal 1 demonstrated mixed but overall positive effectiveness in making progress toward the goal.

Positive progress was observed in several key areas. Graduation rates increased from 87.5% to 90%, A-G completion rates increased from 14.29% to 28%, and CAASPP Math performance improved from 33% to 37% meeting or exceeding standards. Several upper-grade cohorts also demonstrated notable gains in i-Ready ELA and Math performance, particularly in Grades 7–11. Additionally, CTE completion outcomes exceeded the established target.

At the same time, academic outcomes remained inconsistent across grade levels and student groups. While some cohorts demonstrated strong growth, others experienced declines from baseline performance, particularly in certain elementary and middle school grade levels. CAASPP ELA performance remained relatively stable overall, decreasing slightly from 48.7% to 48%.

Unduplicated student group data also reflected mixed outcomes. Socio-economically disadvantaged students demonstrated improvement in several areas, particularly in upper-grade Math performance, while English Learner outcomes fluctuated due to small subgroup sizes and changes in the English Learner progress metric over time.

Overall, the data indicates that the actions implemented under Goal 1 contributed to measurable progress in several priority areas, while continued refinement is needed to achieve more consistent outcomes across all student groups and grade levels.

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

Metrics Modifications

- Metric 1.15 added to show % of Socio Economically Disadvantaged students meeting and exceeding CAASPP scores
- Metric 1.16 added to share CAASPP ELA results for English Learners
- Metric 1.17 added to share CAASPP Math results for English Learners
- Metric 1.18 added to share ELA diagnostic results for all unduplicated students
- Metric 1.19 added to share Math diagnostic results for all unduplicated students
-

Actions Modifications

- Action Item 1.5 EL Supports - further training will be provided to all General Ed teachers, Learning Assistants and Student support team on working with EL students. Dedicated time will be set aside when staff return in the new school year for this training.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	High School Support	High School Coordinator and other high school specific supports to provide support for high school students to ensure success in developing self-determined learners	\$50,000.00	Yes
1.2	MTSS	Providing intervention support to students at risk or below grade level	\$115,000.00	Yes
1.3	Lead Facilitators	Mentoring staff in providing student support	\$11,000.00	Yes
1.6	English Learner Support	Provide supports to increase performance on ELPAC	\$106,000.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	<p>Facility Maintenance and Support for Educational Environment</p> <p>Ensure facilities are continuously in good repair and are constructed and maintained to support an environment appropriate to the learning model, including adequate technology for all staff and students.</p>	Maintenance of Progress Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Dimensions plans on continually having the most up to date learning resources available to all students in order to support 21st century learning skills with up to date technology and safe and fully inventoried classrooms. Facilities that are safe, in good repair, and support modern technology will support our mission of developing self determined learners.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Facilities Inspection Tool The percentage of school facilities meeting or exceeding standards according to the Facilities Inspection Tool, ensuring	As of the beginning of the 2023-24 academic year, 100% of our school facilities have been assessed as meeting or exceeding the required standards	100% of facilities meeting or exceeding standards for safety and operational compliance	100% of facilities meeting or exceeding standards for safety and operational compliance	Maintenance of 100% of facilities meeting or exceeding standards for safety and	Maintained

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	compliance with safety and operational guidelines.	for safety and operational compliance according to our Facilities Inspection Tool. This baseline will serve as our reference point for measuring improvements in facility management and compliance efforts.			operational compliance	
2.2	Classroom Inventory The percentage of classrooms that fully meet the inventory requirements for educational resources and equipment, as determined by annual inventory checks.	At the start of the 2023-2024 school year, our initial inventory checks revealed that 100% of classrooms fully meet the inventory requirements for educational resources and equipment. This baseline will guide our efforts to ensure that all classrooms are adequately equipped to support effective teaching and learning.	100% of classrooms fully meet the inventory requirements for educational resources and equipment	100% of classrooms fully meet the inventory requirements for educational resources and equipment	Maintenance of 100% of classrooms fully meet the inventory requirements for educational resources and equipment	Maintained
2.3	Access to Technology The percentage of students with adequate access to technology, including devices and internet connectivity, necessary for their educational activities.	As of the beginning of the 2023-2024 academic year, 100% of our students have been identified as having adequate access to the necessary technology devices and internet connectivity for their educational activities. This baseline serves as the foundation for our	100% of our students have been identified as having adequate access to the necessary technology devices and internet connectivity for their educational activities.	100% of our students have been identified as having adequate access to the necessary technology devices and internet connectivity for their educational activities.	Maintenance of 100% of our students have been identified as having adequate access to the necessary technology devices and internet connectivity for their educational activities.	Maintained

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		targeted interventions to ensure that all students can effectively participate in digital learning environments.				
2.4	Digital Citizenship and Social Emotional Competency		Digital citizenship standards have been included in expected learning results	Digital Citizenship standards have been added to School Pathways to be included on student AWRs	100% of staff prepared to implement digital citizenship initiatives	Baseline did not exist

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Successful Implementation

- Metric 2.1 – 100% of facilities are meeting or exceeding standards for safety and operational compliance
- Metric 2.2 - 100% of classrooms fully meet the inventory requirements for educational resources and equipment
- Metric 2.3 - 100% of our students have been identified as having adequate access to necessary technology devices and internet connectivity for their educational activities

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

N/A

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Based on our analysis of metrics and outcomes, the implementation of actions showed a high level of effectiveness in achieving Goal 2, as demonstrated by both quantitative and qualitative indicators.

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

Recognition of SEL Needs: Respondents value the emphasis on developing resources for students and families to support SEL and mental health.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.2	Classroom Inventory	Annual inventory of all classrooms	\$16,574.00	No
2.3	Classroom Technology	Ensure students have adequate technology to support their learning	\$40,849.00	Yes
2.4	WiFi Access	Provide Kajeet wifi hotspots for socioeconomically disadvantaged students	\$2,200.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Engagement of the School Community Engage parents, staff, students, and community to provide meaningful educational opportunities for all students within a warm, caring, inspirational environment.	Maintenance of Progress Goal

State Priorities addressed by this goal.

- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

At DCS parents/guardians are the primary educators and sustained parent/guardian involvement in the education of their children contributes greatly to student achievement and a positive school environment. DCS will work with parents/guardians and family members to jointly develop and agree upon strategies to meaningfully involve parents/guardians and family members in district and school activities at all grade levels; advisory, decision-making, and advocacy roles; and activities to support learning at home. Parents/guardians shall continue to be notified of their rights to be informed about and to participate in their children's education and of the opportunities available to them to do so.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Parent Participation Rate in Collaboration Center Activities The percentage of parents actively participating in	The initial baseline for parent participation in Collaboration Center activities is set at 60%, as determined by the most recent assessments at the	60% of parents participated in Collaboration Center activities	60% of parents participated in Collaboration Center activities	75%	-15%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	Collaboration Center activities, aiming to enhance engagement and support for student success.	start of the 2023-2024 academic year.				
3.2	The percentage of respondents who complete surveys, providing valuable feedback for organizational improvement and decision-making.	The baseline for survey completion is established at 25 %, based on data collected from the last round of surveys conducted at the beginning of the 2023-2024 fiscal year.	~10-15% completion rate- all 2024-2025 parent/student LCAP surveys. ~90% staff completion	~51%- Staff ~25%- Parent Student ~38% total avg participation rate Grades 3-5- ~29% Grades 6-12- ~47%	60%	~+26%- Staff Maintained baseline- Parent ~+13%- Student
3.3	The percentage of parents or guardians attending student-led conferences, reflecting engagement in their children's educational progress.	The initial baseline for parent or guardian attendance at student-led conferences is set at 100%, as measured during the academic period in 2023-2024.	100% of parents attended student led conferences	100% of parents attended student led conferences	100%	none
3.4	The percentage of students participating in field trips, indicating engagement and exposure to educational experiences outside the classroom.	The baseline for student participation in field trips is established at 70%, based on the data from the 2023-2024 academic year.	70%	92.3%	75%	+22.3%
3.5	The percentage of pupils actively participating in learning activities, reflecting their engagement and	The baseline for pupil engagement in learning activities is established at 90%, as measured through observations	90% of pupils engaged in learning activities	97% of pupils engaged in learning activities	100%	Increased 7%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	involvement in the educational process.	and assessments at the beginning of the x academic year. This figure will serve as a starting point for developing strategies to increase active participation and enhance the educational experience.				
3.6	The overall perception of the school environment as reported by students, staff, and parents, measuring aspects such as safety, respect, and inclusivity.	The baseline for the overall perception of the school environment is set at 70%, based on surveys conducted with students, staff, and parents at the end of the 2023-2024 school year. This percentage reflects the community's views on safety, respect, and inclusivity, serving as the foundation for targeted improvements in school climate.	From LCAP Survey Collection- Parent- 90%-agree/satisfied with current revised 2025 goals. Student- 97% satisfied with safety, respect, and inclusivity. Staff- 95% satisfied with current conditions and progress towards the DCS mission and LCAP vision.	Parent- 91% satisfied with safety, respect, and inclusivity. Student- 89% satisfied with safety, respect, and inclusivity. Staff- 9% satisfied with current conditions and progress towards the DCS mission and LCAP vision.	80%	Parent- +21% Student- +19% Staff- +25%
3.7	Counseling Engagement	The baseline for counseling engagement is established at 75%, as determined by the number of students	81% of students engaged with school counseling	82% of students engaged with school counseling	95%	-13%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		actively participating in counseling sessions relative to those eligible, measured at the start of the x academic year. This metric will guide efforts to enhance the availability and utilization of counseling services.				

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Successful Implementation

- 3.1 -Parent participation rate in activities has maintained. Parent volunteers manned independent study spaces, chaperoned overnight field trips, and attending learning activities in the community.
- 3.4 – Student participation in field trips was robust. All field trips filled quickly, including the three overnight offerings
- 3.6 – Overall perception of the school was positive, with survey responses reflecting a high level of agreement with schoolwide goals

Implementational Challenges

- 3.2 -Number of survey responses is below targeted goal

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- 3.2 Increase in costs associated with community events
- 3.3 Increase in access, salary increase

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Current survey practices are leading to a much lower than anticipated return on investment. Tying survey opportunities to student conference that are well attended will lead to better future returns.

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

No anticipated changes made to the planned goal, metrics, target outcomes, or actions for the coming year

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Surveys	Survey educational partners for regular feedback	\$2,500.00	No
3.2	Community Activity Opportunities	Provide Community Learning Opportunities for students to apply learning outside the classroom	\$94,074.00	Yes
3.3	Connection to Counseling	Provide academic and social emotional supports for students	\$50,000.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
4	<p>Data-Driven Improvement</p> <p>Using data, identify researched-based classroom differentiation and professional development to ensure all students are making adequate and meaningful academic progress.</p> <p>Leverage data to identify research-based strategies for classroom differentiation and professional development, ensuring that all students achieve meaningful academic progress.</p>	Equity Multiplier Focus Goal

State Priorities addressed by this goal.

- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)
- Priority 7: Course Access (Conditions of Learning)

An explanation of why the LEA has developed this goal.

This goal was developed in response to the needs identified through our data analysis and input from educational partners. Our curriculum adoptions and our work in professional learning have yielded results in our academic progress, as evidenced by our increased number of students meeting or exceeding state standards in Mathematics, however this percentage is still low and needs continued focus. The analysis of our California School Dashboard data indicated a clear need to continue supporting English language arts (ELA), Mathematics and English language development (ELD). Through continued and ongoing data analysis, we will develop and refine our systems designed to meet the needs of all student and faculty/staff in academic support in a positive manner enhanced by data informed decision making.

This goal was established based on a comprehensive review of data and feedback from educational stakeholders. While our curriculum updates and professional development initiatives have led to an increase in the number of students achieving or surpassing state Mathematics standards, the overall percentage remains suboptimal, necessitating sustained attention. Analysis of our California School Dashboard data highlights the ongoing need to support English Language Arts (ELA), Mathematics, and English Language Development (ELD). We are committed to continuously analyzing data to refine and enhance our strategies, aiming to effectively address the academic needs of all students and faculty/staff. This approach will be underpinned by informed decision-making, ensuring a constructive and data-driven environment for academic support.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.1	The percentage of eligible students who participate in the California Assessment of Student Performance and Progress (CAASPP) tests, indicating compliance and engagement with state testing requirements.	95% Participation Rate	94% participation rate	99.63%	99% participation rate	+4.63%
4.2	The percentage of 3rd-11th grade students who participate in the iReady assessments, reflecting engagement with the adaptive learning platform and compliance with assessment protocols.	80% participation Rate	71% avg participation rate	77% avg participation rate (all qualifying grades/subjects)	85% participation rate	-3%
4.3	The percentage of staff members who participate in organizational surveys, assessing engagement and willingness to contribute to workplace improvements. “Percentages are reported as approximate because LCAP surveys are fully anonymous and collected across multiple administration windows.”	~70% Participation Rate	~60% Participation Rate	~51% Participation Rate	~100% participation rate	-40%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	Response totals reflect cumulative submissions, and individual families may have responded more than once. As a result, participation rates should be interpreted as estimates rather than unduplicated counts.”					
4.4	<p>The percentage of parents who participate in school surveys, reflecting their engagement and involvement in providing feedback on school policies and programs.</p> <p>“Percentages are reported as approximate because LCAP surveys are fully anonymous and collected across multiple administration windows. Response totals reflect cumulative submissions, and individual families may have responded more than once. As a result, participation rates should be interpreted as estimates rather than unduplicated counts.”</p>	~25% participation rate	~10% Participation Rate	~25% Participation Rate	~60% participation rate	No change from baseline
4.5	The percentage of students who complete school surveys, indicating their	~25% total avg participation rate	~10% total avg participation rate	~38% total avg participation rate Grades 3-5- ~29%	~60% participation rate	+13% total avg participation rate

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	<p>engagement and willingness to contribute to school improvement efforts.</p> <p>“Percentages are reported as approximate because LCAP surveys are fully anonymous and collected across multiple administration windows. Response totals reflect cumulative submissions, and individual families may have responded more than once. As a result, participation rates should be interpreted as estimates rather than unduplicated counts.”</p>			Grades 6-12- ~47%		

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

100% of participating DCS staff and parents agree that leveraging data is essential for the future success and growth of the school.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

N/A

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Metric 4.3 - Not meeting baseline in participation rates
 Metric 4.4 - Not meeting baseline in participation rates

Metric 4.5 - Not meeting baseline in participation rates

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

No anticipated changes made to the planned goal, metrics, target outcomes, or actions for the coming year

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	Data Analysis	Research and Evaluation of school data for program improvement	\$30,000.00	Yes

Goals and Actions

Goal

Goal #	Description	Type of Goal
5		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

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

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

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

A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
----------	-------	-------------	-------------	--------------

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2026-27]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$499,123	\$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
7.877%	0.783%	\$51,126.99	8.660%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	<p>Action: High School Support</p> <p>Need: Unduplicated students need differentiated support in planning for career and college attendance</p> <p>Scope:</p>	High School coordinator will teach high school success class	Percentage of student completing college and career readiness

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide		

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
<p>1.1</p>	<p>Action: High School Support</p> <p>Need: Increase the number of students taking advantage of postsecondary planning and preparation. Instability can be a great challenge for these students.</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	<p>Will prepare students for a variety of postsecondary options beginning with concurrent enrollment, CTE, and life skills such as high school success and personal finance.</p>	<p>College courses completed, CTE pathway completion, Course Enrollment</p>
<p>1.2</p>	<p>Action: MTSS</p> <p>Need: Dashboard results indicate a need for more student support and interventions, particularly in the area of Mathematics. Creating plans for student to support academic and social emotional growth</p> <p>Scope:</p>	<p>Ensuring assessment and the monitoring of all students' information is complete to inform the development of Personal Learning Plans for each student, including both academic and behavioral/social emotional</p>	<p>CA School Dashboard</p>

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
	Limited to Unduplicated Student Group(s)		
1.3	<p>Action: Lead Facilitators</p> <p>Need: Increased need for assistance in supporting unduplicated student learning needs</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	Staff required mentoring in supporting students with other needs	Growth in academic progress by students working with staff being mentored
1.6	<p>Action: English Learner Support</p> <p>Need: Need more small group and concentrated instruction</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	Small group and concentrated instruction will be provided to all English Learners in person and/or virtually	ELPAC Scores and student reclassification percentages
2.3	<p>Action: Classroom Technology</p> <p>Need: Chromebooks and other tech for unduplicated students</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	Access to technology and online resources will ensure that students all students have equitable access to virtual learning support	Percentage of unduplicated students receiving Chromebook
2.4	<p>Action: WiFi Access</p>	Hotspots will ensure equitable access to online resources will ensure that students all students have equitable access to virtual learning support	Percent of students with access to wifi

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
	<p>Need: Access to Wifi</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>		
3.2	<p>Action: Community Activity Opportunities</p> <p>Need: Provide opportunities for students to attend community and field events</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	Provide community learning activities for students who otherwise would not be able to attend	Number of students attending events
3.3	<p>Action: Connection to Counseling</p> <p>Need: Increased student engagement with academic counseling and social-emotional supports in order to promote student engagement.</p> <p>Scope: Limited to Unduplicated Student Group(s)</p>	Creating a transformational environment that addresses student engagement concerns through increased academic, career, and college readiness as well as supports for social-emotional issues that are impacting engagement.	Percentage of students accessing counseling services
4.1	<p>Action: Data Analysis</p> <p>Need: Using data to make data/strategic informed decisions around student progress</p> <p>Scope:</p>	Research and evaluation of all school data will allow for analysis of trends in order to pinpoint areas of concern	Assessment participation rate, assessment result trends, survey participation

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
	Limited to Unduplicated Student Group(s)		

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	24-1	
Staff-to-student ratio of certificated staff providing direct services to students	24-1	

2026-27 Total Planned Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	6,336,179	499,123	7.877%	0.783%	8.660%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$518,197.00	\$0.00	\$0.00	\$0.00	\$518,197.00	\$336,000.00	\$182,197.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	High School Support	English Learners Foster Youth Low Income	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	Annually	\$45,000.00	\$5,000.00	\$50,000.00				\$50,000.00	
1	1.2	MTSS	English Learners Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	Annually	\$110,000.00	\$5,000.00	\$115,000.00				\$115,000.00	
1	1.3	Lead Facilitators	English Learners Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	Annually	\$11,000.00	\$0.00	\$11,000.00				\$11,000.00	
1	1.6	English Learner Support	English Learners	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	Annually	\$40,000.00	\$66,000.00	\$106,000.00				\$106,000.00	
2	2.2	Classroom Inventory	All	No			All Schools		\$0.00	\$16,574.00	\$16,574.00				\$16,574.00	
2	2.3	Classroom Technology	English Learners Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		\$0.00	\$40,849.00	\$40,849.00				\$40,849.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
2	2.4	WiFi Access	Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	Foster Youth Low Income	All Schools		\$0.00	\$2,200.00	\$2,200.00				\$2,200.00	
2	2.6							Annually								
3	3.1	Surveys	All	No				Annually	\$0.00	\$2,500.00	\$2,500.00				\$2,500.00	
3	3.2	Community Activity Opportunities	Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	Foster Youth Low Income	All Schools	Annually	\$50,000.00	\$44,074.00	\$94,074.00				\$94,074.00	
3	3.3	Connection to Counseling	English Learners Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	Annually	\$50,000.00	\$0.00	\$50,000.00				\$50,000.00	
4	4.1	Data Analysis	English Learners Foster Youth Low Income	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		\$30,000.00	\$0.00	\$30,000.00				\$30,000.00	

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
6,336,179	499,123	7.877%	0.783%	8.660%	\$499,123.00	0.000%	7.877 %	Total:	\$499,123.00
								LEA-wide Total:	\$50,000.00
								Limited Total:	\$499,123.00
								Schoolwide Total:	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	High School Support	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$50,000.00	
1	1.2	MTSS	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$115,000.00	
1	1.3	Lead Facilitators	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$11,000.00	
1	1.6	English Learner Support	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	\$106,000.00	
2	2.2	Classroom Inventory				All Schools	\$16,574.00	
2	2.3	Classroom Technology	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$40,849.00	
2	2.4	WiFi Access	Yes	Limited to Unduplicated Student Group(s)	Foster Youth Low Income	All Schools	\$2,200.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
3	3.2	Community Activity Opportunities	Yes	Limited to Unduplicated Student Group(s)	Foster Youth Low Income	All Schools	\$94,074.00	
3	3.3	Connection to Counseling	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$50,000.00	
4	4.1	Data Analysis	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	\$30,000.00	

2025-26 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$624,274.00	\$644,274.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	High School Support	Yes	\$95,000.00	110,000
1	1.2	MTSS	Yes	\$115,000.00	125,000
1	1.3	Lead Facilitators	Yes	\$22,000.00	11,000
1	1.6	English Learner Support	Yes	\$106,000.00	95,000
2	2.2	Classroom Inventory	No	\$16,574.00	16,574
2	2.3	Classroom Technology	Yes	\$50,000.00	50,000
2	2.4	WiFi Access	Yes	\$2,200.00	2,200
3	3.1	Surveys	No	\$2,500.00	2,500
3	3.2	Community Activity Opportunities	Yes	\$125,000.00	132,000
3	3.3	Connection to Counseling	Yes	\$60,000.00	70,000
4	4.1	Data Analysis	Yes	\$30,000.00	30,000

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)

2025-26 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
594,274	\$605,200.00	\$623,002.20	(\$17,802.20)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	High School Support	Yes	\$95,000.00	110,000		
1	1.2	MTSS	Yes	\$115,000.00	125,000		
1	1.3	Lead Facilitators	Yes	\$22,000.00	11,000		
1	1.6	English Learner Support	Yes	\$106,000.00	95,000		
2	2.3	Classroom Technology	Yes	\$50,000.00	50,000		
2	2.4	WiFi Access	Yes	\$2,200.00	2,200		
3	3.2	Community Activity Opportunities	Yes	\$125,000.00	132,000		
3	3.3	Connection to Counseling	Yes	\$60,000.00	70,000		
4	4.1	Data Analysis	Yes	\$30,000.00	30,000		

2025-26 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
6,529,451	594,274	1.223	10.324%	\$623,002.20	0.000%	9.541%	\$51,126.99	0.783%

Local Control and Accountability Plan Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[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 Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (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.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. 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 Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners 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 the nature of some LCAP template sections 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, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

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 must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners 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 tool for engaging educational partners.

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 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statutes of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners 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 educational partners 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 educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 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 and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 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 document. Additionally, the beginning of each template section includes information emphasizing the purpose that 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 present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
 - If the LEA has unexpended LREBG funds the LEA must provide the following:
 - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
 - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
 - An explanation of how the action is aligned with the allowable uses of funds identified in [EC Section 32526\(c\)\(2\)](#); and
 - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by [EC Section 32526\(d\)](#).
 - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the [LREBG Program Information](#) web page.
 - Actions may be grouped together for purposes of these explanations.
 - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
 - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32627(d), to provide the information identified above or to include actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

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

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

- Identify the schools within the LEA that have 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.

- 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

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

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, 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 engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

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

Requirements

Requirements

School districts and COEs: [EC Section 52060\(g\)](#) and [EC Section 52066\(g\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. 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.

Charter schools: [EC Section 47606.5\(d\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

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. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062](#);
 - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see [Education Code Section 52068](#); and
- For charter schools, see [Education Code Section 47606.5](#).

- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, 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 educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is 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 target 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 students
 - Analysis of effectiveness of the specific actions to achieve the goal
 - Analysis of material differences in expenditures
 - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
 - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners 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 must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners 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 must 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. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. 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, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

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.
 - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **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.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

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.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
 - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
 - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
 - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: [EC Section 42238.024\(b\)\(1\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad 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.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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

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 educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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 must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- 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 local indicator self-reflection tools within the Dashboard.
- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
 - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
 - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.
- **Required metrics for actions supported by LREBG funds:** To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.
 - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> • Enter the metric number.
Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
 - Use the most recent data associated with the 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 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (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.
 - Indicate the school year to which the baseline data applies.
 - The baseline data must remain unchanged throughout the three-year LCAP.
 - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
 - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
 - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
 - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

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

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 . Leave blank until then.	Enter information in this box when completing the LCAP for 2026–27 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 or when adding a new metric.	Enter information in this box when completing the LCAP for 2025–26 and 2026–27 . Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
 - Include a discussion of relevant challenges and successes experienced with the implementation process.
 - This discussion 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.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
 - 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 educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
 - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

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

- 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.
 - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
 - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
 - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
 - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased 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 contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations, Title 5 [5 CCR] Section 15496* in the Increased or Improved Services section of the LCAP.

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.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
 - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
 - Professional development for teachers.
 - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
 - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
 - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
 - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to [EC Section 32526\(d\)](#). For information related to the required needs assessment please see the Program Information tab on the [LREBG](#)

[Program Information](#) web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the [California Statewide System of Support LREBG Resources](#) web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32627(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in [EC Section 32526\(c\)\(2\)](#).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
 - Identify the action as an LREBG action;
 - Include an explanation of how research supports the selected action;
 - Identify the metric(s) being used to monitor the impact of the action; and
 - Identify the amount of LREBG funds being used to support the action.

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

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, 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 educational partners 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.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 CCR Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

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 identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all 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 increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated 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).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA’s 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).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, 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 increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.
- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
 - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
 - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

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

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming 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.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- 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 transitional kindergarten through grade five), 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."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **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).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
 - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **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.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
 - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to EC Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
 - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
 - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Coversheet

Consideration of FY26-27 Adopted Budget

Section: XIII. Action Items for Dimensions Collaborative School
Item: D. Consideration of FY26-27 Adopted Budget
Purpose: Vote
Submitted by: Doug Miller
Related Material: DimensionsCollaborative_AdoptedBudget_2026.pdf

BACKGROUND:

Charter Schools must submit their budgets to the chartering authority and their county office of education, Education code 47604.33:

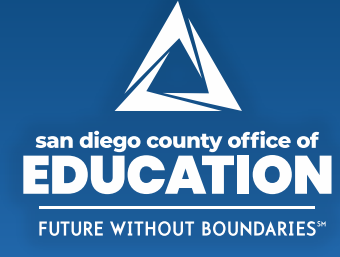
- By July 1st for adopted budget.
- On or before December 15th, for first interim financial report. This report shall reflect changes through October 31st
- On or before March 15, a second interim financial report. This report shall reflect changes through January 31st
- On or before September 15th, a final unaudited report for the full prior year.

The FY 2026 -2027 Adopted Budget projects a deficit of \$103,205

Financial Impact: \$8,821,061

RECOMMENDATION:

Approve the FY 2026-2027 Adopted Budget



DATA ENTRY

FINANCE REPORTING PERIOD DATA ENTRY FORM

Certification Page

Data Entry

Cash Flow

MYP

Dashboard

Print Report

CHARTER SCHOOL INFORMATION

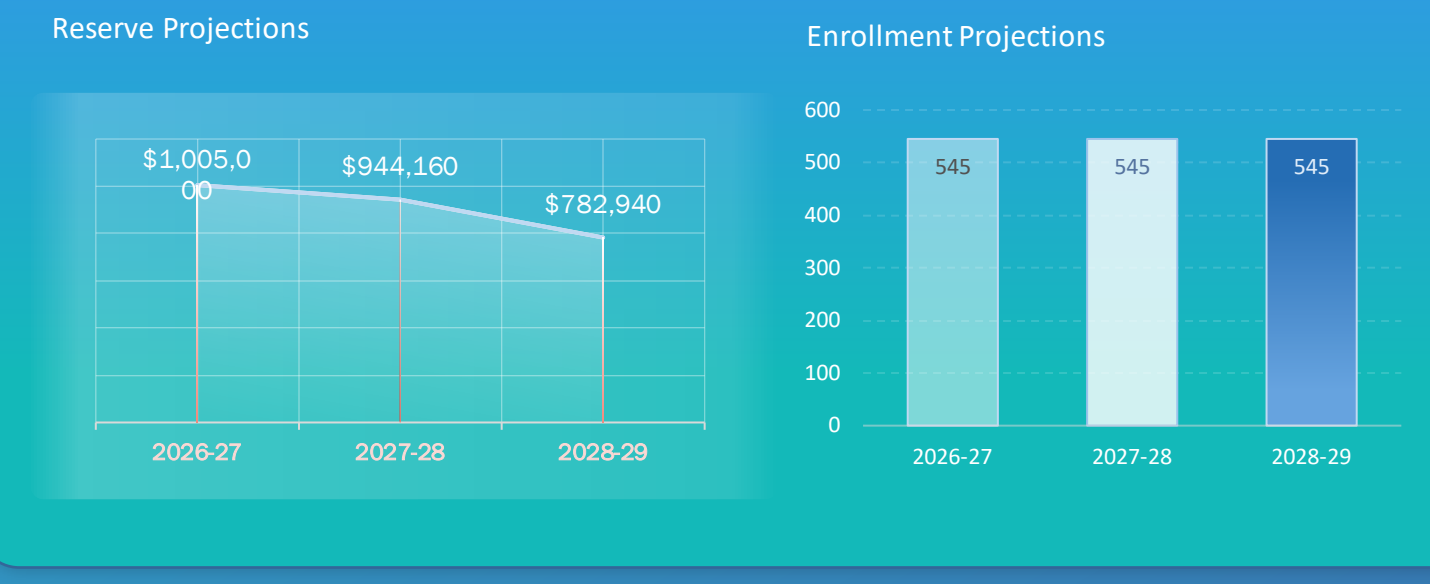
Charter School Name: **Dimensions Collaborative**
 CDS #: 37103710137752
 Charter #: 14308
 Charter Approving Entity: San Diego County Office of Education
 County: San Diego
 District: San Diego County Office of Education

Funding Type: Directly funded
 Entity Type: K-12 Schools (Public)
 Grades Served: K-12
 Virtual Instruction Type: Not Virtual

This charter school uses the following basis of accounting: (Please enter an "X" in the applicable box below; check only one box)

- Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)
- Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

FINANCIAL REPORTING PERIOD KPI's



FINANCIAL REPORTING PERIOD SUMMARY

Reporting Period **Adopted Budget** (A) = Accrual (M) = Modified
 Fiscal Year **2026-27**

Total Revenue 8,717,856
 Total Expenditure 8,821,061
 Net Change in Fund Balance (103,205)
 Unrestricted Ending Fund Balance 4,251,997
 Reserve Ratio 11.39% (A) 0.00% (M)

Description	Object Code	Estimated Actuals/ PY Second Interim			No Actuals			Adopted Budget			Total Variance		Explanation for Variances (Required for variances over 10% please note differences between unrestricted and restricted as applicable.)	
		Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)		
A. REVENUES														
1. LCFF Sources														
State Aid - Current Year	8011	6,090,463	-	6,090,463	-	-	-	6,569,322	-	6,569,322	478,859	7.86%		
Education Protection Account State Aid - Current Year	8012	103,794	-	103,794	-	-	-	107,794	-	107,794	4,000	3.85%		
State Aid - Prior Years	8019	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers to Charter Schools in Lieu of Property Taxes	8096	324,833	-	324,833	-	-	-	324,833	-	324,833	-	0.00%		
Other LCFF Transfers	8091, 8097	-	-	-	-	-	-	-	-	-	-	-	-	
Total, LCFF Sources		6,519,090	-	6,519,090	-	-	-	7,001,949	-	7,001,949	482,859	7.41%		
2. Federal Revenues														
Every Student Succeeds Act	8290	-	-	-	-	-	-	-	-	-	-	-	-	
Special Education - Federal	8181, 8182	-	91,425	91,425	-	-	-	-	75,400	75,400	(16,025)	-17.53%		
Child Nutrition - Federal	8220	-	14,763	14,763	-	-	-	-	13,408	13,408	(1,355)	-9.18%		
Donated Food Commodities	8221	-	-	-	-	-	-	-	-	-	-	-	-	
Other Federal Revenues	8110, 8260-8299	-	-	-	-	-	-	-	-	-	-	-	-	
Total, Federal Revenues		-	106,188	106,188	-	-	-	-	88,808	88,808	(17,380)	-16.37%		
3. Other State Revenues														
Special Education - State	StateRevSE	-	486,518	486,518	-	-	-	-	700,553	700,553	214,035	43.99%		
All Other State Revenues	StateRevAO	114,539	236,659	351,198	-	-	-	630,128	187,918	818,046	466,848	132.93%		
Total, Other State Revenues		114,539	723,177	837,716	-	-	-	630,128	888,471	1,518,599	680,883	81.28%		
4. Other Local Revenues														
All Other Local Revenues	LocalRevAO	92,625	-	92,625	-	-	-	108,500	-	108,500	15,875	17.14%		
Total, Local Revenues		92,625	-	92,625	-	-	-	108,500	-	108,500	15,875	17.14%		
5. TOTAL REVENUES		6,726,254	829,365	7,555,619	-	-	-	7,740,577	977,279	8,717,856	1,162,237	15.38%		
B. EXPENDITURES														
1. Certificated Salaries														
Certificated Teachers' Salaries	1100	2,348,044	388,933	2,736,977	-	-	-	2,400,444	397,613	2,798,057	61,080	2.23%		
Certificated Pupil Support Salaries	1200	-	131,339	131,339	-	-	-	-	137,998	137,998	6,659	5.07%		
Certificated Supervisors' and Administrators' Salaries	1300	335,167	75,184	410,351	-	-	-	403,930	90,609	494,539	84,188	20.52%		
Other Certificated Salaries	1900	-	-	-	-	-	-	-	-	-	-	-	-	
Total, Certificated Salaries		2,683,211	595,456	3,278,667	-	-	-	2,804,374	626,220	3,430,594	151,927	4.63%		
2. Noncertificated Salaries														
Noncertificated Instructional Salaries	2100	67,758	91,263	159,021	-	-	-	76,178	102,605	178,783	19,762	12.43%		
Noncertificated Support Salaries	2200	40,052	154,246	194,298	-	-	-	13,641	52,833	66,474	(127,824)	-65.79%		
Noncertificated Supervisors' and Administrators' Salaries	2300	269,925	-	269,925	-	-	-	302,644	-	302,644	32,719	12.12%		
Clerical, Technical and Office Salaries	2400	319,009	34,483	353,492	-	-	-	404,468	43,720	448,188	94,696	26.79%		
Other Noncertificated Salaries	2900	41,414	-	41,414	-	-	-	68,407	-	68,407	26,993	65.18%		
Total, Noncertificated Salaries		738,158	279,992	1,018,150	-	-	-	865,338	199,158	1,064,496	46,346	4.55%		
3. Employee Benefits														
STRS	3101-3102	512,493	113,732	626,225	-	-	-	535,635	119,608	655,243	29,018	4.63%		
PERS	3201-3202	-	-	-	-	-	-	-	-	-	-	-	-	
OASDI / Medicare / Alternative	3301-3302	112,103	22,381	134,484	-	-	-	105,354	21,034	126,388	(8,096)	-6.02%		
Health and Welfare Benefits	3401-3402	374,178	99,613	473,791	-	-	-	393,232	104,685	497,917	24,126	5.09%		
Unemployment Insurance	3501-3502	8,565	2,214	10,779	-	-	-	8,959	2,316	11,275	496	4.60%		
Workers' Compensation Insurance	3601-3602	22,228	5,471	27,699	-	-	-	28,938	7,123	36,061	8,362	30.19%		
OPEB, Allocated	3701-3702	-	-	-	-	-	-	-	-	-	-	-	-	
OPEB, Active Employees	3751-3752	-	-	-	-	-	-	-	-	-	-	-	-	
Other Employee Benefits	3901-3902	57,044	7,246	64,290	-	-	-	64,290	-	64,290	-	0.00%		
Total, Employee Benefits		1,086,611	250,657	1,337,268	-	-	-	1,136,408	254,766	1,391,174	59,906	4.03%		
4. Books and Supplies														
Approved Textbooks and Core Curricula Materials	4100	147,292	2,708	150,000	-	-	-	171,840	3,160	175,000	25,000	16.67%		
Books and Other Reference Materials	4200	6,000	1,500	7,500	-	-	-	6,000	1,500	7,500	-	0.00%		
Materials and Supplies	4300	420,911	44,589	465,500	-	-	-	434,474	46,026	480,500	15,000	3.22%		
Noncapitalized Equipment	4400	81,111	3,889	85,000	-	-	-	81,111	3,889	85,000	-	0.00%		
Food	4700	-	35,000	35,000	-	-	-	-	35,000	35,000	-	0.00%		
Total, Books and Supplies		655,314	87,686	743,000	-	-	-	693,425	89,575	783,000	40,000	5.38%		
5. Services and Other Operating Expenditures														
Subagreements for Services	5100	165,750	50,000	215,750	-	-	-	375,750	50,000	425,750	210,000	97.33%		
Travel and Conferences	5200	12,500	2,500	15,000	-	-	-	20,000	2,500	22,500	7,500	50.00%		
Dues and Memberships	5300	21,600	900	22,500	-	-	-	21,500	1,000	22,500	-	0.00%		
Insurance	5400	101,312	-	101,312	-	-	-	69,202	-	69,202	(32,110)	-31.69%		
Operations and Housekeeping Services	5500	56,500	-	56,500	-	-	-	55,600	-	55,600	(900)	-1.59%		
Rentals, Leases, Repairs, and Noncap. Improvements	5600	686,294	44,681	730,975	-	-	-	714,370	46,021	760,391	29,416	4.02%		
Transfers of Direct Costs	5700-5799	-	-	-	-	-	-	-	-	-	-	-	-	
Professional/Consulting Services and Operating Expnd.	5800	339,251	162,055	501,306	-	-	-	374,079	175,000	549,079	47,773	9.53%		
Communications	5900	60,060	8,215	68,275	-	-	-	45,545	6,230	51,775	(16,500)	-24.17%		
Total, Services and Other Operating Expenditures		1,443,267	268,351	1,711,618	-	-	-	1,676,046	280,751	1,956,797	245,179	14.32%		
6. Capital Outlay														
(Objects 6100-6170, 6200-6500 modified accrual basis only)														
Land and Land Improvements	6100-6170	-	-	-	-	-	-	-	-	-	-	-	-	
Buildings and Improvements of Buildings	6200	100,000	-	100,000	-	-	-	150,000	-	150,000	50,000	50.00%		
Books and Media for New School Libraries or Major														
Expansion of School Libraries	6300	-	-	-	-	-	-	-	-	-	-	-	-	
Equipment	6400	-	-	-	-	-	-	-	-	-	-	-	-	
Equipment Replacement	6500	-	-	-	-	-	-	-	-	-	-	-	-	
Lease Assets	6600	-	-	-	-	-	-	-	-	-	-	-	-	
Subscription Assets	6700	-	-	-	-	-	-	-	-	-	-	-	-	
Depreciation Expense (accrual basis only)	6900	45,000	-	45,000	-	-	-	45,000	-	45,000	-	0.00%		
Amortization Expense - Lease Assets	6910	-	-	-	-	-	-	-	-	-	-	-	-	
Amortization Expense - Subscription Assets	6920	-	-	-	-	-	-	-	-	-	-	-	-	
Total, Capital Outlay		145,000	-	145,000	-	-	-	195,000	-	195,000	50,000	34.48%		
7. Other Outgo														
Tuition to Other Schools	7110-7143	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	-	-	-	-	-	-	-	-	
All Other Transfers	7281-7299	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers of Indirect Costs	7300-7399	-	-	-	-									

1. Beginning Fund Balance/Net Position												
a. As of July 1	9791	4,900,624	132,662	5,033,286	-	-	-	4,354,317	885	4,355,202	(678,084)	-13.47%
b. Adjustments/Restatements	9793, 9795	-	-	-	-	-	-	-	-	-	-	-
c. Adjusted Beginning Fund Balance /Net Position		4,900,624	132,662	5,033,286	-	-	-	4,354,317	885	4,355,202	(678,084)	-13.47%
2. Ending Fund Balance /Net Position, June 30 (E+F1c)												
		4,354,317	885	4,355,202	-	-	-	4,224,303	27,694	4,251,997	(103,205)	-2.37%
Components of Ending Fund Balance (Modified Accrual Basis only)												
a. Nonspendable												
1. Revolving Cash (equals Object 9130)	9711	-	-	-	-	-	-	-	-	-	-	-
2. Stores (equals Object 9320)	9712	-	-	-	-	-	-	-	-	-	-	-
3. Prepaid Expenditures (equals Object 9330)	9713	-	-	-	-	-	-	-	-	-	-	-
4. All Others	9719	-	-	-	-	-	-	-	-	-	-	-
b. Restricted	9740	-	-	-	-	-	-	-	-	-	-	-
c. Committed												
1. Stabilization Arrangements	9750	-	-	-	-	-	-	-	-	-	-	-
2. Other Commitments	9760	-	-	-	-	-	-	-	-	-	-	-
d. Assigned	9780	-	-	-	-	-	-	-	-	-	-	-
e. Unassigned/Unappropriated												
1. Reserve for Economic Uncertainties	9789	-	-	-	-	-	-	-	-	-	-	-
2. Unassigned/Unappropriated Amount	9790M	-	-	-	-	-	-	-	-	-	-	-
3. Components of Ending Net Position (Accrual Basis only)												
a. Net Investment in Capital Assets	9796	-	-	-	-	-	-	-	-	-	-	-
b. Restricted Net Position	9797	3,349,978	885	3,350,863	-	-	-	3,119,303	27,694	3,146,997	(203,866)	-6.08%
c. Unrestricted Net Position	9790A	1,004,339	-	1,004,339	-	-	-	1,005,000	-	1,005,000	661	0.07%
G. ASSETS												
1. Cash												
a. In County Treasury	9110	2,085,198	885	2,086,083	-	-	-	1,954,303	27,694	1,981,997	(104,086)	-4.99%
b. Fair Value Adjustment to Cash in County Treasury	9111	-	-	-	-	-	-	-	-	-	-	-
c. In Banks	9120	2,499,032	-	2,499,032	-	-	-	2,500,000	-	2,500,000	968	0.04%
d. In Revolving Fund	9130	-	-	-	-	-	-	-	-	-	-	-
e. With Fiscal Agent/Trustee	9135	-	-	-	-	-	-	-	-	-	-	-
f. Collections Awaiting Deposit	9140	-	-	-	-	-	-	-	-	-	-	-
2. Investments												
3. Accounts Receivable												
4. Due from Grantor Governments												
5. Stores												
6. Prepaid Expenditures (Expenses)												
7. Other Current Assets												
8. Lease Receivable												
9. Capital Assets (accrual basis only)												
10. TOTAL ASSETS												
		6,175,039	885	6,175,924	-	-	-	6,024,303	27,694	6,051,997	(123,927)	-2.01%
H. DEFERRED OUTFLOWS OF RESOURCES												
1. Deferred Outflows of Resources												
2. TOTAL DEFERRED OUTFLOWS												
I. LIABILITIES												
1. Accounts Payable												
2. Due to Grantor Governments												
3. Current Loans												
4. Unearned Revenue												
5. Long-Term Liabilities (accrual basis only)												
6. TOTAL LIABILITIES												
		1,820,722	-	1,820,722	-	-	-	1,800,000	-	1,800,000	(20,722)	-1.14%
J. DEFERRED INFLOWS OF RESOURCES												
1. Deferred Inflows of Resources												
2. TOTAL DEFERRED INFLOWS												
K. FUND BALANCE /NET POSITION												
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J)												
	EFB	4,354,317	885	4,355,202	-	-	-	4,224,303	27,694	4,251,997	(103,205)	-2.37%
(must agree with Line F2)												