



Magnolia Public Schools

Regular Board Meeting

Date and Time

Thursday April 7, 2022 at 6:00 PM PDT

Location

<https://zoom.us/j/97856064990?pwd=MHhBZCtGT0xEMIZpNEZQZVJ3RDZBPZz09>

Meeting ID: 978 5606 4990 **Passcode:** 021250

One tap mobile: +16699009128,,97856064990# US (San Jose)

All members of the public can participate by calling in using the numbers provided above.

In compliance with the Americans with Disabilities Act (ADA) and upon request, Magnolia Public Schools may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Members of the public who need special accommodations or translation are strongly encouraged to contact Magnolia Public Schools at least 24 hours in advance of the Board meeting so assistance can be assured.

Any public records relating to an agenda item for an open session which are distributed to all, or a majority of all, of the Board Members shall be available for public inspection. Magnolia Public Schools values public comment during Board meetings. Pursuant to AB 361 members of the public may address the Board during the Public Comment period on the day of the board meeting without the need to complete a public speaker form. We limit individual speakers to three (3) minutes and speakers with interpreters to six (6) minutes. For any questions regarding this meeting email board@magnoliapublicschools.org or call 213-628-3634 Ext. 100.

Board Members:

Ms. Sandra Covarrubias, Chair

Dr. Umit Yapanel, Vice-Chair

Dr. Salih Dikbas

Ms. Diane Gonzalez

Mr. Mekan Muhammedov

CEO & Superintendent:

Mr. Alfredo Rubalcava

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:00 PM
Opening Items			
A. Call the Meeting to Order			1 m
B. Record Attendance and Guests			1 m
C. Approval of Agenda	Vote		1 m
D. Public Comments			5 m
E. Approval of Minutes from MPS Regular Board Meeting - February 10, 2022	Approve Minutes		1 m
F. Approval of Minutes from MPS Regular Board Meeting - February 24, 2022	Approve Minutes		1 m
G. Approval of Minutes from MPS Regular Board Meeting - March 10, 2022	Approve Minutes		1 m
H. Approval of Minutes from MPS Regular Board Meeting - March 24, 2022	Approve Minutes		1 m
II. Closed Session			6:12 PM
A. Public Announcement of Closed Session	FYI		1 m
B. Hearing for Appeal of Expulsion Determination			90 m
C. Report Out of Closed Session	FYI		1 m
III. Information/Discussion Items			7:44 PM
A. 2021-22 MPS Educational Partners Survey Results & Reflections and Public Feedback to Inform LCAP	Discuss	D.Yilmaz	30 m
B. Discussion and Update Regarding Sale of Strip of Land to City Recreation and Parks for Purpose of Constructing Ice Hockey Rink	Vote	P.Ontiveros	10 m
IV. Action Items			8:24 PM
A. Board Approval of Findings to Conduct Virtual Meetings Pursuant to AB 361/Government Code Section 54953	Vote	A.Rubalcava	5 m
B. Approval of Updated MPS Health and Safety Policy and Injury and Illness Prevention Program ("IIPP") COVID-19 Addendum	Vote	D.Hajmeirza	5 m
C. Approval of Assurance of Compliance for 2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services for Magnolia Science Academy-5	Vote	E.Acar	10 m
D. Approval of Magnolia Public Schools Student Recognition and Incentive Policy	Vote	J.Hernandez	5 m

	Purpose	Presenter	Time
E. Approval to Extend Due Diligence Period for Purchase of 18242 Sherman Way	Vote	P.Ontiveros	10 m
F. Approval to Extend Due Diligence Period for Purchase of 7111 Winnetka Ave	Vote	P.Ontiveros	7 m
G. Approval of Magnolia Public Schools Fiscal Policies and Procedures Manuel for 2021-2022	Vote	Finance Committee	5 m
V. Closing Items			9:11 PM
A. Adjourn Meeting	Vote		1 m

Cover Sheet

Approval of Minutes from MPS Regular Board Meeting - February 10, 2022

Section:	I. Opening Items
Item: February 10, 2022	E. Approval of Minutes from MPS Regular Board Meeting -
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Board Meeting on February 10, 2022

APPROVED



Magnolia Public Schools

Minutes

Regular Board Meeting

Date and Time

Thursday February 10, 2022 at 6:00 PM

Location

<https://zoom.us/j/97856064990?pwd=MHhBZCtGT0xEMIZpNEZQZVJ3RDZBPZz09>

Meeting ID: 978 5606 4990 **Passcode:** 021250

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Board Members:

Ms. Sandra Covarrubias, Chair

Dr. Umit Yapanel, Vice-Chair

Dr. Salih Dikbas

Ms. Diane Gonzalez

Mr. Mekan Muhammedov

CEO & Superintendent:

Mr. Alfredo Rubalcava

Directors Present

M. Muhammedov (remote), S. Covarrubias (remote), S. Dikbas (remote), U. Yapanel (remote)

Directors Absent

D. Gonzalez

Directors who arrived after the meeting opened

S. Covarrubias

Directors who left before the meeting adjourned

M. Muhammedov, S. Covarrubias

I. Opening Items

A. Call the Meeting to Order

S. Covarrubias called a meeting of the board of directors of Magnolia Public Schools to order on Thursday Feb 10, 2022 at 6:04 PM.

B. Record Attendance and Guests

Refer to attendance information stated above.

C. Approval of Agenda

S. Covarrubias made a motion to approve the agenda as presented.

U. Yapanel seconded the motion.

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

Roll Call

S. Covarrubias	Aye
M. Muhammedov	Aye
S. Dikbas	Aye
D. Gonzalez	Absent
U. Yapanel	Aye

D. Public Comments

B.Lopez, Chief External Officer, announced that students are in the process of receiving college acceptance letters and some are preparing for the interview process for Ivy League schools.

E. Announcements from CEO & Superintendent and Board Members

A.Rubalcava, CEO & Superintendent announced the advocacy work happening regarding schools receiving hold harmless protections. He gave an update on school sites COVID-19 infectious rates and announces that the STEAM Expo is upcoming and will keep the Board informed regarding the event. The Board congratulated students who are in the process of receiving their college acceptances and thanked College Counselors for their continued work.

F. Approval of Minutes from MPS Regular Board Meeting - January 20, 2022

S. Covarrubias made a motion to approve the minutes from Regular Board Meeting on 01-20-22.

M. Muhammedov seconded the motion.

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

Roll Call

S. Covarrubias	Aye
M. Muhammedov	Aye
D. Gonzalez	Absent
U. Yapanel	Aye
S. Dikbas	Aye

II. Closed Session

A. Public Announcement of Closed Session

S.Covarrubias announced that the Board would be going into Closed Session to discuss public employment and anticipated initiation of litigation for one case and would report out any actions taken.

B. Public Employment (§ 54957)

This item was discussed in Closed Session.

C. Anticipated Initiation of Litigation §54956.9(c): (1 case)

This item was discussed in Closed Session.

S. Covarrubias left at 6:43 PM.

D. Report Out of Closed Session

M.Muhammedov announced in Open Session at 7:05pm that the Board discussed the two items. The Board voted to initiate dispute resolution in regards to Prop 39 for Magnolia Science Academy-6 and Board directed staff to take any legal actions.

III. Consent Items

A. Approval of Revised MPS Home Visit Policy

M. Muhammedov made a motion to approve the revised Magnolia Public Schools Home Visit Policy.

U. Yapanel seconded the motion.

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

Roll Call

U. Yapanel	Aye
D. Gonzalez	Absent
S. Covarrubias	Absent
M. Muhammedov	Aye
S. Dikbas	Aye

IV. Information/Discussion Items

A. 2021-22 MPS Demographics

D.Yilamz, Chief Accountability Officer, stated that this would be a standing item to be presented to the Board every January/February of each year to showcase the changing demographics over the years. L.Woods, Executive Office Manager, presented CALPADS Fall 1 data which MPS certified in December 2021. Fall 1 reports capture student data elements and enrollments based on census day data. Magnolia wide and each school site's census day historical enrollments were presented. Correlations regarding enrollment decreases come from the discovery that families are leaving the area/leaving the state or due to the move of the school. In addition the enrollment by ethnicity, gender, English Learner and student disability rates were discussed with comparison to 2020-2021 data. There was a decrease in free/reduced rates. School staff had followed up with the families through various communications and in person to walk through with them the process of filling out the alternate household income forms for families to see if they are eligible. Data regarding the unduplicated pupil counts, GATE student rates, homeless student rates, immigrant student rates, foster youth counts were also elaborated. J.Hook, Assistant Executive Office Manager, presented the attendance data. Average daily attendance (ADA) percentages per school are all in the low 90 percent. There was a slight decrease in ADA percentage reported

due to the fact that students are out in quarantine or isolation due to COVID-19. She also showed the non-classroom ADA percentage through Independent Study.

B. Academic Department Updates

E.Acar, Chief Academic Officer, went over professional developments focusing on culture and improving collaboration and communication and informed of the STEAM events and other culture events happening at the school sites. Following the Board's approval of increasing school days they are planning professional development opportunities. As well as continuing the efforts of Teacher On Special Assignments (TOSA's) lead my W.Gray, College & Career Readiness Program & TOSA Coordinator. Independent Study updates and IXL, MyOn, MAP and IAB data updates were provided. W.Gray gave TOSA Program Updates and their focus themes being; common instructional techniques used to support student learning and showcasing events from each department to help learning come alive for the students.

S. Covarrubias arrived at 6:40 PM.

C. Enrollment Update

B.Lopez, Chief External Officer, updated the Board on information regarding targeted enrollments for the following school year. Each school sites enrollment data was showcased which included the count on intent to return applications that were submitted and where each school stood on their targeted enrollments for the 2022-2023 school year. Infinite Campus enrollments were also presented. Board Members questions were addressed the staff.

D. Discussion Regarding Governors Proposals for the 2022-23 State Budget and K-12 Education

S.Budhreja, Chief Financial Officer, informed the Board on California Governor Newsom's January proposal for 2022-23 upcoming school year. He went over information provided by the state regarding revenues and funds available for K-12 education. He presented possible concerns such as uncertainty related to the COVID-19 pandemic and inflation. A.Rubalcava, CEO & Superintendent, highlighted advocacy fronts related to what is on the Governor's proposal. Possible changes that may give charter schools similar protections to Districts in the Governor's May revise that will officially be signed in June of 2022.

M. Muhammedov left at 6:55 PM.

V. Action Items

A. Approval of Revisions to the 2021-22 School Leaders Pay Raise Scale

With the Board approving the revised home visit policy, S.Acar, Chief Operations Officer, presented that the approval also correlated to revisions made to the existing 2021-22 school leaders pay raise scale to add the home visit pay components for regular home visits for \$50 and virtual home visits for \$25.

S. Covarrubias made a motion to approve the one time add on pays for virtual and regular home visits to the school leaders pay scale.

U. Yapanel seconded the motion.

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

Roll Call

S. Dikbas	Aye
M. Muhammedov	Absent
U. Yapanel	Aye
S. Covarrubias	Aye

Roll Call

D. Gonzalez Absent

B. Approval of MPS Comprehensive School Safety Plans

Per California Education Code Section 32281(a), schools are required to develop and maintain a comprehensive school safety plan to address campus risks, preparation of emergencies and create a safe environment for the students and staff. As stated by J.Hernandez, Director of Student Services, the plans are changed as needed and educational partners were encouraged to provide feedback for the school plans. All required components as stated in the Education Code were addressed in the plans. A.Prado, Dean of Students at Magnolia Science Academy (MSA)-Bell and G.Serce, Principal at MSA-San Diego presented their schools safety plans.

S. Covarrubias made a motion to approve the Comprehensive School Safety Plans for the school year 2022-23 for the following MPS Schools: MSA-1, MSA-2, MSA-3, MSA-4, MSA-7, MSA-Bell, MSA-Santa Ana, and MSA-San Diego.

U. Yapanel seconded the motion.

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

Roll Call

D. Gonzalez Absent

M. Muhammedov Absent

U. Yapanel Aye

S. Dikbas Aye

S. Covarrubias Aye

C. Approval of Changes to the School Calendars for Magnolia Science Academies-2, 4, and 6

Magnolia Science Academies- 2, 4 & 6 were closed on Monday, January 10, 2022. Prior to the closure, Magnolia home office and school leaders met in an emergency meeting during the winter break holiday to discuss and ensure that schools could open given the requirements of COVID-19 testing and by looking at staff positive case rates during the holiday break. Staff exhausted all possible efforts including reaching out to substitute teacher companies and home office staff personnel to substitute classes. MSA-2, 4 and 6's staff shortage was substantial and could not operate on Monday. MSA-4 and 6 had enough instructional minutes to compensate for a lost day. Their changes were to add, January 10th as a no school day. MSA-2, did not have enough instructional minutes to absorb that lost day. MSA-2's calendar change is to change three of their minimum school days to regular school days. They will not applying for J-13 A.

S. Dikbas made a motion to approve the changes to the school calendars for Magnolia Science Academies-2, 4, and 6.

U. Yapanel seconded the motion.

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

Roll Call

M. Muhammedov Absent

S. Dikbas Aye

S. Covarrubias Aye

U. Yapanel Aye

D. Gonzalez Absent

D.

Approval of Updated MPS Health and Safety Policy and Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum

D.Hajmeirza, Director of Human Resources, presented the updated Health and Safety Policy and IIPP Addendum which reflects recent guidelines from CDC, CDPH and other county public health officials. These updates included the exposure management policy regarding quarantining. MSA-2,3,4,6 and 8 must wear surgical-grade, non-cloth masks indoors and outdoors at all times except eating or drinking.

U. Yapanel made a motion to approve the updated MPS Health & Safety Policy alongside the Injury and Illness Prevention Program COVID-19 addendum.

S. Dikbas seconded the motion.

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

Roll Call

S. Covarrubias	Aye
D. Gonzalez	Absent
M. Muhammedov	Absent
S. Dikbas	Aye
U. Yapanel	Aye

E. Approval of Modular-Tech and Zingo Construction for Facility Maintenance and Improvement

Previously presented to the MPS Audit/Facilities Committee on February 3, 2022 which the Committee approved for recommended approval to the full Board.

M.Sahin, MPS Project Manager, added that both vendors were previously Board approved for the preferred vendor list of contracts below \$50,000. Per the MPS fiscal policy they could not exceed that threshold. By adding these vendors to the Master Vendors list, these two vendors would continue maintaining and improving MPS private sites where they can provide services over \$50,000 if the need arises. Board Members questions were addressed by the staff.

S. Covarrubias made a motion to approve Modular-Tech and Zingo Construction as vendors for facility maintenance and improvement projects for all MPS campuses.

S. Dikbas seconded the motion.

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

Roll Call

M. Muhammedov	Absent
S. Dikbas	Aye
S. Covarrubias	Aye
U. Yapanel	Aye
D. Gonzalez	Absent

F. Approval of CalSHAPE Plumbing Grant Resolution for Magnolia Science Academy- Santa Ana

Magnolia Science Academy-Santa Ana had applied for the CalSHAPE Plumbing Grant and were approved for a total of \$49,620.58 for the grant. M.Sahin, Project Manager, added that this grant will be used to fix and upgrade facility related plumbing and water issues at the campus. Board Members questions were addressed by staff.

S. Covarrubias made a motion to approve and adopt Board Resolution # 20220210-01, attached as Exhibit A, to authorize Magnolia Science Academy Santa Ana to receive a plumbing and ventilation grant from the California Energy Commission to implement a CalSHAPE Program project.

U. Yapanel seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

D. Gonzalez Absent
S. Covarrubias Aye
U. Yapanel Aye
M. Muhammedov Absent
S. Dikbas Aye

G. Approval of CalSHAPE Plumbing Grant Resolution for Magnolia Science Academy- 1

Magnolia Science Academy-1 had applied for the CalSHAPE Plumbing Grant. M.Sahin, Project Manager, stated that CalSHAPE had informed staff that due to limited funding they were not able to fund MSA-1 as well as MSA-7. After that time, staff was recently informed that MSA-1 was approved for the grant for a total of \$60,920.29. With the recent information the motion would be amended to reflect the approval of receiving the grant. Board Members questions were addressed by staff and thanked the team for their efforts.

S. Covarrubias made a motion to amend the existing motion and read that the motion would be to approve and adopt Board Resolution # 20220210-02, attached as Exhibit A, to authorize Magnolia Science Academy- 1 to receive a plumbing and ventilation grant from the California Energy Commission to implement a CalSHAPE Program project.

S. Dikbas seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

U. Yapanel Aye
S. Dikbas Aye
S. Covarrubias Aye
D. Gonzalez Absent
M. Muhammedov Absent

H. Approval of CalSHAPE Plumbing Grant Resolution for Magnolia Science Academy- 7

Magnolia Science Academy-7 had applied for the CalSHAPE Plumbing Grant. M.Sahin, Project Manager, stated that similar to MSA-1, CalSHAPE had informed staff that due to limited funding they were not able to fund MSA-1 as well as MSA-7. After that time, staff was recently informed that MSA-7 was approved for the grant for a total of \$45,599.05. With the recent information the motion would be amended to reflect the approval of receiving the grant.

S. Dikbas made a motion to amend the existing motion and read that the motion would be to approve and adopt Board Resolution # 20220210-03, attached as Exhibit A, to authorize Magnolia Science Academy- 7 to receive a plumbing and ventilation grant from the California Energy Commission to implement a CalSHAPE Program project.

S. Covarrubias seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

S. Dikbas Aye
M. Muhammedov Absent
S. Covarrubias Aye
D. Gonzalez Absent
U. Yapanel Aye

I.

Review and Approval of Resolution Concerning Measures to Address the Organizational and Educational Impacts of the COVID-19 Virus

A.Rubalcava, CEO & Superintendent, went over the prior resolutions that the Board had approved and adopted back in 2020 which addressed the authority of the Chief Executive Officer to act during times of emergency to respond to operational impacts of COVID-19. Certain powers were granted to the CEO when it came to the approval of operational items due to the impacts of the pandemic. On August 10, 2021 the Board had approved to revoke and repeal such resolutions as the pandemic during that time was seeing signs of improvement towards normalcy. Current time, with the COVID-19 variant, COVID-19 is still persistent such as the sudden closure of certain schools after the winter break. U. Yapanel made a motion to adopt Resolution #20220210-04 to reimpose resolutions; Resolution #20200313-01, Resolution #20200320-01, Resolution #20200327-01, Resolution #20200402-02 and Resolution # 20200723-01 and all attendant powers and authorizations, including the power and authority of the Chief Executive Officer to close one or more school-sites due to a COVID-19 related purpose.

S. Covarrubias seconded the motion.

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

Roll Call

S. Covarrubias Aye
U. Yapanel Aye
S. Dikbas Aye
D. Gonzalez Absent
M. Muhammedov Absent

J. Board Approval of Findings to Conduct Virtual Meetings Pursuant to AB 361/Government Code Section 54953

MPS Board of Directors discussed and reconsidered the circumstances of the State of Emergency related to COVID-19 in which meeting in person can directly impact the ability of the Board and public to meet safely. As such, local officials are still continuing to recommend measures to promote social distancing.

S. Dikbas made a motion to adopt the findings relating to the ability of the Board to conduct meetings due to teleconference during the State of Emergency, in reference to AB 361/Government Code Section 54953.

U. Yapanel seconded the motion.

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

Roll Call

U. Yapanel Aye
S. Dikbas Aye
S. Covarrubias Aye
D. Gonzalez Absent
M. Muhammedov Absent

VI. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:19 PM.

Respectfully Submitted,
S. Covarrubias

Cover Sheet

Approval of Minutes from MPS Regular Board Meeting - February 24, 2022

Section:	I. Opening Items
Item: February 24, 2022	F. Approval of Minutes from MPS Regular Board Meeting -
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Board Meeting on February 24, 2022

APPROVED



Magnolia Public Schools

Minutes

Regular Board Meeting

Date and Time

Thursday February 24, 2022 at 6:00 PM

Location

<https://zoom.us/j/97856064990?pwd=MHhBZCtGT0xEMIZpNEZQZVJ3RDBPZz09>

Meeting ID: 978 5606 4990 **Passcode:** 021250

One tap mobile: +16699009128,,97856064990# US (San Jose)

Board Members:

Ms. Sandra Covarrubias, Chair

Dr. Umit Yapanel, Vice-Chair

Dr. Salih Dikbas

Ms. Diane Gonzalez

Mr. Mekan Muhammedov

CEO & Superintendent:

Mr. Alfredo Rubalcava

Directors Present

D. Gonzalez (remote), M. Muhammedov (remote), S. Covarrubias (remote), S. Dikbas (remote), U. Yapanel (remote)

Directors Absent

None

Directors who arrived after the meeting opened

D. Gonzalez, S. Dikbas

Directors who left before the meeting adjourned

D. Gonzalez

I. Opening Items

A. Call the Meeting to Order

S. Covarrubias called a meeting of the board of directors of Magnolia Public Schools to order on Thursday Feb 24, 2022 at 6:08 PM.

B. Record Attendance and Guests

Refer to attendance information recorded above.

C. Approval of Agenda

S. Covarrubias made a motion to approve the agenda as presented.
M. Muhammedov seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

S. Dikbas	Absent
M. Muhammedov	Aye
D. Gonzalez	Absent
U. Yapanel	Aye
S. Covarrubias	Aye

D. Public Comments

No public comments were given at this time.

E. Announcements from CEO & Superintendent and Board Members

A.Rubalcava, CEO & Superintendent, went over that school sites will be presenting the Glows, Grows and Priorities before the Board. At the upcoming Board Meetings MSA-4,6,7,8, Santa Ana and San Diego will provide their presentations. He also informed the Board that I.Soto, will transition to a new role outside of Magnolia Public Schools and would be leaving his role as the Senior Director of Development & Communications. B.Lopez, Chief External Officer, expressed the same sentiment of the impact he had at Magnolia. Board Members wished him the best and thanked him for everything that he has done.

II. Information/Discussion Items

A. Glows, Grows & Priorities Presentations

Magnolia Science Academies-1,2,3 and 5 presented their Glows Grows and Priorities Presentations. Board Members and the public were given an opportunity to give questions and comments at the end of each schools presentations.
D. Gonzalez arrived at 6:30 PM.
S. Dikbas arrived at 6:49 PM.

B. Local Control and Accountability Plans (LCAP) Mid-Year Update

D.Yilmaz, Chief Accountability Officer, went over the discussion points for the LCAP mid-year updates. The LCFF budget overview for parents provided updates for additional funding schools received for 2021-2022 year. S.Budhraj, Chief Financial Officer, provided further information for this item for each school site. O.Polat, Director of State and Federal Programs, went over the supplemental for the annual LCAP 2021-22 update and each of the five prompts. Schools site

principals presented their LCAP Mid-Year report update on their LCAP outcomes, expenditures and actions. Board Members questions were addressed by staff.

D. Gonzalez left at 7:28 PM.

D. Gonzalez arrived at 7:38 PM.

C. Annual Authorizer Oversight Reports for MSA 1, 2, 3 & 5

S.Budhraj, Chief Financial Officer, went over the authorizer reports regarding the fiscal oversight for Magnolia Science Academies 1,2,3 and 5 provided by the Los Angeles County Office of Education (LACOE). LACOE had reviewed MPS 2020-2021 audit report which found no findings as previously presented to the Board on January 20, 2022. There were corrective action findings notes in the 2019-2020 audit report which he discussed and mentioned the internal controls taken place to address those findings leading to the 2020-21 audit report.

III. Action Items

A. Approval of Amended and Restated MPS Bylaws

A.Rubalcava, CEO & Superintendent, and J.Lara, Executive Assistant & Board Secretary, went over the amendments made the Magnolia educational & Research Foundation (Magnolia Public Schools) Bylaws. It reflected the addition of AB 824 language of a student serving and as Student Board Member on the Board of Directors and the Board's authority in creating one or more advisory committees composed of directors and non-directors under Article VII of the Bylaws. Board Members questions were addressed and feedback was collected.

D. Gonzalez made a motion to approve the amended and restated Magnolia Educational & Research Foundation Bylaws.

S. Dikbas seconded the motion.

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

Roll Call

D. Gonzalez	Aye
S. Covarrubias	Abstain
M. Muhammedov	Aye
S. Dikbas	Aye
U. Yapanel	Aye

IV. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:15 PM.

Respectfully Submitted,
S. Covarrubias

Cover Sheet

Approval of Minutes from MPS Regular Board Meeting - March 10, 2022

Section:	I. Opening Items
Item: March 10, 2022	G. Approval of Minutes from MPS Regular Board Meeting -
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Board Meeting on March 10, 2022

APPROVED



Magnolia Public Schools

Minutes

Regular Board Meeting

Date and Time

Thursday March 10, 2022 at 7:00 PM

Location

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Meeting ID: 978 5606 4990 **Passcode:** 021250

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Board Members:

Ms. Sandra Covarrubias, Chair

Dr. Umit Yapanel, Vice-Chair

Dr. Salih Dikbas

Ms. Diane Gonzalez

Mr. Mekan Muhammedov

CEO & Superintendent:

Mr. Alfredo Rubalcava

Directors Present

D. Gonzalez (remote), M. Muhammedov (remote), S. Covarrubias (remote), U. Yapanel (remote)

Directors Absent

S. Dikbas

I. Opening Items**A. Call the Meeting to Order**

S. Covarrubias called a meeting of the board of directors of Magnolia Public Schools to order on Thursday Mar 10, 2022 at 7:04 PM.

B.

Record Attendance and Guests

Refer to attendance information recorded above.

C. Approval of Agenda

D. Gonzalez made a motion to approve the amended action to reflect removal of Action Items IV D & IV E.

M. Muhammedov seconded the motion.

A.Rubalcava, CEO & Superintendent, provided context regarding the tabling of the two items.

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

Roll Call

D. Gonzalez	Aye
S. Dikbas	Absent
U. Yapanel	Aye
M. Muhammedov	Aye
S. Covarrubias	Aye

D. Public Comments

G.Serce, Principal at MSA-San Diego, announced that the schools Robotics team qualified to the state finals which they had attended. This would be the first year they would attend. He also announced that the schools Archery team would be attending the San Diego Championship Conference. Also many students are participating in the 'W.I.Z.A.R.D.' Way (Wisdom, Intelligence, Zest, Accountability Respect and Determination). And that he is excited to see students participate.

Lastly, he thanked A.Rubalcava, CEO & Superintendent, for joining this week at MSA-San Diego. B.Lopez, Chief External Officer, invited all for a youth symposium held at MSA-7 in partnership with sorority, Sigma Gamma Rho to empower youth. And she gave a shoutout to Ms. Allen who had a connection with the sorority for this event.

E. Announcements from CEO & Superintendent and Board Members

A.Rubalcava, CEO & Superintendent, highlighted and congratulated SRLA runners from MSA-1,8 and 3 who ran the Los Angeles Marathon. He also highlighted an alumni reunion from former students from MSA-2. Read Across America was also a staple this week at school sites. He also mentioned the Career Fair hosted at MSA-5. And in honor of Women's History Month, recognized MSA-Bell for their Girls Leadership & Mentoring Workshop.

II. Public Hearing

A. Public Hearing for A-G Completion Improvement Grant Plans for MSA-1, 2, 3, 4, 5, and Santa Ana

E.Acar, Chief Academic Officer, joined with W.Gray, College and Career Readiness and TOSA Coordinator, went over the A-G Completion Improvement Grant Plans for public hearing to gather further feedback. The funding grant amounts for each school site was showcased. The plans will be taken at a later Board Meeting for the Boards approval. He shared the graduation rates for each school site. W.Gray spoke about that overall the A-G eligibility rate is high so they asked the schools to focus the expenditures on student groups in areas that have created pockets of ineligibility among the students. He went over focus areas such as comprehensive advising plans and other student supports (i.e. tutoring, 4-year

plans and college counseling services), expanding access to A-G coursework, expanding credit recovery opportunities, paying for AP test fees and others. He went over how the money will be monitored to ensure the success of the plans. Board Members questions were addressed by staff.

III. Information/Discussion Items

A. Glows, Grows and Priorities Presentations

Magnolia Science Academies-4,6,7 and 8 presented their Glows Grows and Priorities Presentations. Board Members and the public were given an opportunity to give questions and comments at the end of each schools presentations.

IV. Action Items

A. Approval of Second Interim Reports for the 2021-22 Fiscal Year

S.Budhreja, Chief Financial Officer, shared the Second Interim Report, a snapshot of the operating budget for the current year which will run from July 1, 2021 and ends June 30, 2022. First interim Report was discussed and approved by the Board back in December of 2021. He went over actual data, assumptions when developing the budget and projections. He went over the budget adjustments and revisions comparing the 2021-22 First Interim Report which include; enrollment based on 2021-22 projected P-2 student counts and changes in revenues and expenditures that were adjusted accordingly. He went over the budget by school site. Board Members questions were addressed by staff.

M. Muhammedov made a motion to approve the 2021-22 Second Interim Budget Reports as the most recent revised budget for the 2021-22 fiscal year for all MSA schools.

U. Yapanel seconded the motion.

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

Roll Call

M. Muhammedov	Aye
S. Covarrubias	Aye
S. Dikbas	Absent
U. Yapanel	Aye
D. Gonzalez	Aye

B. Approval of COVID-19 Discretionary Bonus for MPS Employees

D.Hajmeirza, Director of Human Resources, presented the resolution which would be intended to provide a bonus to show a token of appreciation to staff and encourage retention after navigating a difficult year with COVID-19. Employees at the school site and home office would be eligible to receive a lump sum payment of either \$4,500 or \$2,500 depending on their status as full or part-time employees. This will be paid by using a portion of COVID-19 funds and is incorporated in the Second Interim Report.

U. Yapanel made a motion to approve the one-time COVID-19 Discretionary Bonus Resolution # 20220310-01 for all eligible MPS employees including administrative, classified, and certificated staff.

S. Covarrubias seconded the motion.

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

Roll Call

S. Dikbas	Absent
M. Muhammedov	Aye
D. Gonzalez	Aye

Roll Call

U. Yapanel Aye
S. Covarrubias Aye

C. Approval of Updated MPS Health and Safety Policy and Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum

D.Hajmeirza, Director of Human Resources, presented the updated Health and Safety Policy and IIPP Addendum which reflects recent guidelines from CDC, CDPH and other county public health officials. Those changes in the policy include; testing and reporting, extracurricular activities and masking requirements. U. Yapanel made a motion to approve the updated MPS Health & Safety Policy alongside the Injury and Illness Prevention Program (“IIPP”) COVID-19 addendum. D. Gonzalez seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

U. Yapanel Aye
S. Covarrubias Aye
D. Gonzalez Aye
S. Dikbas Absent
M. Muhammedov Aye

D. Approval of Purchase and Installation of a Sound System and LED Video Wall Display for MSA-Santa Ana

This item was tabled as stated during the Approval of Agenda.

E. Approval of Purchase and Installation of Three Shade Structures for MSA-Santa Ana

This item was tabled as stated during the Approval of Agenda.

F. Approval to Exercise Option to Extend Due Diligence Contingency Period for Purchase of 7111 Winnetka Avenue

This was presented at the March 8, 2022 Audit/Facilities Committee Meeting. M.Muhammedov, Board Member & Chair of the Committee, reported out of what was discussed at the Committee. Staff have voiced extending the due diligence period to further analyze the property and see their options and the development costs and financials which is ongoing. The Committee had approved for their recommended approval to the full Board. P.Ontiveros, General Counsel & Director of Facilities, added that they are continuing to speak with financial advisor John Buck and provided projections which would be taken to a lender which would generate a term sheet. The term sheet, once received, would be provided to the authorizer for feedback. He said that staff are looking at different options for construction. Him and M.Sahin, Project Manager are looking at different options to support and find the most cost effective construction method. Board Members questions were addressed by staff.

S. Covarrubias made a motion to approve (1) the exercise by MPS of its option under that certain purchase and sale agreement signed by MPS dated as of December 15, 2021 for the purchase of the property located at 7111 Winnetka Ave. (the “Property”) to extend its contingency/due diligence period for one (1) thirty (30) day period from March 22, 2022 to April 21, 2022, and in conjunction therewith, (2) the release by MPS of Fifteen Thousand Dollars (\$15,000.00) from the escrow established for the aforementioned transaction as consideration for the exercise of the extension option, and (3) the execution by the MPS CEO and

Superintendent, or his designees, of such documents and instruments as may be necessary to undertake and complete the foregoing actions.

D. Gonzalez seconded the motion.

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

Roll Call

M. Muhammedov	Aye
U. Yapanel	Aye
S. Dikbas	Absent
D. Gonzalez	Aye
S. Covarrubias	Aye

G. Approval of Findings to Conduct Virtual Meetings Pursuant to AB 361/Government Code Section 54953

MPS Board of Directors discussed and reconsidered the circumstances of the State of Emergency related to COVID-19 in which meeting in person can directly impact the ability of the Board in addition to the all standing Board Committees (Finance, Audit/Facilities, Academic, Stakeholder and Development & Nominating/Governance Committees) and public to meet safely. As such, local officials are still continuing to recommend measures to promote social distancing. Board Members questions were addressed by staff.

D. Gonzalez made a motion to adopt the findings relating to the ability of the MPS Board and all MPS Committees to conduct meetings due to teleconference during the State of Emergency, in reference to AB 361/Government Code Section 54953.

S. Covarrubias seconded the motion.

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

Roll Call

U. Yapanel	Aye
S. Dikbas	Absent
S. Covarrubias	Aye
D. Gonzalez	Aye
M. Muhammedov	Aye

V. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:52 PM.

Respectfully Submitted,
S. Covarrubias

Cover Sheet

Approval of Minutes from MPS Regular Board Meeting - March 24, 2022

Section:	I. Opening Items
Item: March 24, 2022	H. Approval of Minutes from MPS Regular Board Meeting -
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Board Meeting on March 24, 2022

APPROVED



Magnolia Public Schools

Minutes

Regular Board Meeting

Date and Time

Thursday March 24, 2022 at 6:00 PM

Location

<https://zoom.us/j/97856064990?pwd=MHhBZCtGT0xEMIZpNEZQZVJ3RDZBPZz09>

Meeting ID: 978 5606 4990 **Passcode:** 021250

One tap mobile: +16699009128,,97856064990# US (San Jose)

Board Members:

Ms. Sandra Covarrubias, Chair

Dr. Umit Yapanel, Vice-Chair

Dr. Salih Dikbas

Ms. Diane Gonzalez

Mr. Mekan Muhammedov

CEO & Superintendent:

Mr. Alfredo Rubalcava

Directors Present

D. Gonzalez (remote), M. Muhammedov (remote), S. Covarrubias (remote), S. Dikbas (remote), U. Yapanel

Directors Absent

None

Directors who arrived after the meeting opened

U. Yapanel

I. Opening Items**A. Call the Meeting to Order**

S. Covarrubias called a meeting of the board of directors of Magnolia Public Schools to order on Thursday Mar 24, 2022 at 6:06 PM.

B. Record Attendance and Guests

Refer to attendance information stated above.

C. Approval of Agenda

D. Gonzalez made a motion to approve the agenda as presented.
M. Muhammedov seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

M. Muhammedov Aye
U. Yapanel Absent
D. Gonzalez Aye
S. Dikbas Aye
S. Covarrubias Aye
U. Yapanel arrived at 6:07 PM.

D. Public Comments

No public comments were given at this time.

E. Announcements from CEO & Superintendent and Board Members

A.Rubalcava, CEO & Superintendent, congratulated MSA-1,3 and Bell students and staff who ran the Los Angeles Marathon. He highlighted MSA-2 for their successful WASC visit and thanked S.Covarrubias, Board Chair, for joining. He mentioned that school sites celebrated spirit week for Pi Day. He congratulated MSA-San Diego Archery team who placed 2nd place at the Conference Championship. He congratulated MSA-7 student who participated in the Scripps Spelling Bee. He thanked M.Muhammedov, Board Member, for his attendance at the MSA-1 and MSA-5 school site visit. M.Muhammedov, thanked the staff from MSA-1 and MSA-5 and mentioned the visit was successful and hosted David Downing, Indra Ciccarelli and LACOE Board Member, Yvonne Chan.

II. Closed Session

A. Public Announcement of Closed Session

S.Covarrubias announced that the Board would be going into Closed Session to discuss public employee performance evaluation for the CEO & Superintendent and conference with legal counsel concerning anticipated litigation for two cases and would report out any actions taken.

B. Public Employee Performance Evaluation (§ 54957) - Title: CEO & Superintendent

This item was discussed in Closed Session.

C. Conference with Legal Counsel - Anticipated Litigation (§ 54956.9): 2 cases

This item was discussed in Closed Session.

D. Report Out of Closed Session

S.Covarrubias announced in Open Session at 7:09pm that the Board directed staff to follow on the items with the recommendations provided by the Board and the Board assigned two Board members to lead the CEO evaluation.

III. Information/Discussion Items

A. Glows, Grows and Priorities Presentations

Magnolia Science Academies-Santa Ana and San Diego presented their Glows Grows and Priorities Presentations. Board Members and the public were given an opportunity to give questions and comments at the end of each schools presentations.

IV. Action Items

A. Approval of A-G Completion Improvement Grant Plans for MSA-1, 2, 3, 4, 5 and Santa Ana

Public Hearing for A-G Improvement Grant Plans was held on March 10, 2022 Regular Board Meeting. School teams such as School Counselors, Deans of Academics, and Principals met with the Accountability Department and Academic Department from the home office to develop the plans. W.Gray, College and Career Readiness and TOSA Coordinator, provided a high level overview of the processes and outcomes when developing the plans. He mentioned schools observed their data to finalize their plans to address A-G non-completers. He mentioned how some schools will be spending their grant money to address this such as training for teachers on how to support students in class, providing credit recovery options especially with students with learning disabilities, expanding dual enrollment for students taking college courses, and some campuses sought to make a College & Career Readiness Centers for educational partners to come and learn how to get on track. S.Keskinturk, Principal at MSA-Santa Ana, detailed the schools plan. Board Members questions were addressed by staff.

S. Covarrubias made a motion to approve the A-G Completion Improvement Grant Plans for Magnolia Science Academies 1, 2, 3, 4, 5 and Santa Ana.

D. Gonzalez seconded the motion.

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

Roll Call

M. Muhammedov	Aye
S. Dikbas	Aye
D. Gonzalez	Aye
S. Covarrubias	Aye
U. Yapanel	Aye

B. Approval of HopSkipDrive to the Approved Vendor List

E.Acar, Chief Academic Officer, presented the approval of adding HopSkipDrive to the approved vendor list to continue providing transportation services for students who are in need of this specific need based service. He had outlined the services that were sought while also commenting that this was to ensure that students are able to get access to a free and appropriate education. An RFP was established and HopSkipDrive was the only proposal that was submitted by the deadline. The service would be purchased as a consortium to include all schools.

M. Muhammedov made a motion to approve the addition of the following vendor, HopSkipDrive, to the approved vendor list.

S. Covarrubias seconded the motion.

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

Roll Call

S. Dikbas Aye
 U. Yapanel Aye
 S. Covarrubias Aye
 D. Gonzalez Aye
 M. Muhammedov Aye

C. Approval of MPS E-Rate Funding Year 2022

R.Monoshev, Director of Technology, spoke regarding the E-Rate application of MPS for the upcoming fiscal year. He said that discounts were based on the percentage of enrolled students eligible for Free/Reduced Lunch per school site. He assed that MPS discount for FY 2022 is expected to be 80% for Internet, WAN connectivity and network infrastructure components. The discount for voice services is expected to be 80% for FY 2022. Staff reached out to all school sites to identify their needs. He detailed the process. Board Members questions were addressed by staff.

M. Muhammedov made a motion to retroactively approve the winning bids which were approved by MPS CEO, Mr. Rubalcava with the powers granted to him by the board February 10th for the E-Rate RFP posting.

S. Covarrubias seconded the motion.

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

Roll Call

S. Dikbas Aye
 M. Muhammedov Aye
 D. Gonzalez Aye
 U. Yapanel Aye
 S. Covarrubias Aye

D. Approval of Updated MPS Health and Safety Policy and Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum

D.Hajmeirza, Director of Human Resources, presented the updated Health and Safety Policy and IIPP Addendum which reflects recent guidelines from CDC, CDPH and other county public health officials. Changes include the testing and reporting guidelines and masking guidelines. Board Members questions were addressed by staff.

D. Gonzalez made a motion to approve the updated MPS Health & Safety Policy alongside the Injury Illness Prevention Program (“IIPP”) COVID-19 addendum.

S. Covarrubias seconded the motion.

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

Roll Call

U. Yapanel Aye
 M. Muhammedov Aye
 D. Gonzalez Aye
 S. Covarrubias Aye
 S. Dikbas Aye

E. Approval of Submission of Application for Charter School Facilities Program by MSA-1, 2, 5 and 7

P.Ontiveros, General Counsel & Director of Facilities, presented that the Office of Public School Construction opened up a new application filing round for the Charter School Facility Program (CSFP). During that time, \$94million dollars was available for projects. He expressed that applying for this program would go towards facility projects that MPS is working on with some of the schools. In the

past, MSA-Santa Ana's project was funding through CSFP. Application window is from May 2nd to June 3rd of 2022. He went over the requirements of submitting for this program and has notified the school district as per one of the requirements. Board Members questions were addressed by staff.

U. Yapanel made a motion to approves MPS to submit applications for funding through the Charter School Facility Program ("CSFP") administered by the State of California Department of General Services Office of Public School Construction ("OPSC") for such MPS schools as MPS Staff may deem appropriate, including, but not limited to, Magnolia Science Academy—1, Magnolia Science Academy—2, Magnolia Science Academy—5, and Magnolia Science Academy—7 and to take such actions and sign such documents as shall be necessary in order to submit such applications in accordance with CSFP requirements.

S. Dikbas seconded the motion.

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

Roll Call

S. Covarrubias Aye
 M. Muhammedov Aye
 S. Dikbas Aye
 U. Yapanel Aye
 D. Gonzalez Aye

F. Approval to Revise Stakeholder & Development Committee Name to Educational Partners & Development Committee

Item was presented to the Stakeholder & Development Committee on March 10, 2022. S.Covarrubias, Board Chair & Chair of the Committee reported out from the Committee's discussion. To stay consistent with State Board of Education, MPS would adopt the replacement term of "educational partners" instead of stakeholder as it was no longer being utilized when referring to parents, staff and community members. She reported that the functions of the committee would remain the same.

U. Yapanel made a motion to approve the revision of the Committee title Development & Stakeholder Committee to Educational Partners & Development Committee.

S. Covarrubias seconded the motion.

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

Roll Call

U. Yapanel Aye
 S. Dikbas Aye
 S. Covarrubias Aye
 M. Muhammedov Aye
 D. Gonzalez Aye

G. Approval of Magnolia Public Schools 2022-23 Board of Directors Handbook

This item was presented at the Nominating/Governance Committee on March 17, 2022. U.Yapanel, Vice-Chair & Chair of the Committee reported out on the Committee's discussion. He said that critical information was added that would be useful for a new board member to reference and that information regarding MPS goals and vision and mission were included. The Committee had voted previously to recommended full approval to the Board. The Board gave their thanks on the completion and edits to the Handbook.

S. Covarrubias made a motion to approve and adopt the 2022-23 Board of Directors Handbook.

U. Yapanel seconded the motion.

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

Roll Call

M. Muhammedov Aye
D. Gonzalez Aye
S. Dikbas Aye
S. Covarrubias Aye
U. Yapanel Aye

V. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:31 PM.

Respectfully Submitted,
S. Covarrubias

Cover Sheet

2021-22 MPS Educational Partners Survey Results & Reflections and Public Feedback to Inform LCAP

Section: III. Information/Discussion Items
Item: A. 2021-22 MPS Educational Partners Survey Results & Reflections and Public Feedback to Inform LCAP
Purpose: Discuss
Submitted by:
Related Material: 2021-22 MPS Educational Partners Survey Results & Reflections and Public Feedback to Inform LCAP.pdf



Board Agenda Item #	III A: Information/Discussion Item
Date:	April 7, 2022
To:	Magnolia Public Schools - Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	David Yilmaz, Chief Accountability Officer
RE:	2021-22 MPS Educational Partners Survey Results & Reflections and Public Feedback to Inform LCAP

Proposed Board Recommendation

N/A

Background

MPS annually conducts student, parent, and staff surveys to improve our educational partners' school experience. Conducting such surveys is an essential part of MPS' LCAP development process. As explained in detail in the reports, MPS uses the CORE Districts survey instrument with questions on four topics:

Topic 1:	Climate of Support for Academic Learning
Topic 2:	Knowledge and Fairness of Discipline, Rules and Norms
Topic 3:	Safety
Topic 4:	Sense of Belonging (School Connectedness)

To further engage our educational partners in the evaluation of their experience MPS also asks three open-ended free-response questions:

- 1) WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL?
- 2) WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL?
- 3) WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

Please see the attached reports on MPS' 2021-22 educational partners survey results. The reports include participation rates of students, families, and staff in the MPS annual school experience surveys, average approval rates for each topic and question on the surveys and school employee evaluation scores based on the surveys.

Responses to the open-ended questions are not included in this report due to confidentiality. However, school leadership teams and the Home Office teams (academics, accountability, HR, OC, and CEO) read all free responses, summarize major findings and recommendations by our educational partners, and consider all the feedback to create action steps for school improvement. The Home Office teams review the findings with each school leadership team. School leadership teams are then held accountable for sharing the survey results and findings with their educational partners at their site (teachers, parents, etc.) and developing an action plan for improvement.

Each school leadership team is also asked to write a reflection on the survey results and findings that identifies their greatest progress, greatest needs, and ways to improve so that we can maintain and improve educational quality of our schools on an ongoing basis. The teams are typically expected to complete their reflections in March, present it to the educational partners committee around March/April (if applicable), and eventually share it with the board in April. The feedback collection, reflection, and planning of next steps are all an integral part of our LCAP development process. Please find attached each school's educational partners survey reflections page that will inform the LCAP.

Budget Implications

N/A

How Does This Action Relate/Affect/Benefit All MSAs?

Educational partners survey reflection is a necessary and required step of the LCAP development and school improvement cycle.

Name of Staff Originator:

David Yilmaz, Chief Accountability Officer

Exhibits (Attachments):

- Report on 2021-22 MPS Educational Partners Survey Results.....Pg.3
- Panorama 2021-22 MPS Average Approval Rates by Question (*Student, Family, Staff*).....Pg. 50
- Panorama 2021-22 MPS Detailed Survey Reports (*Student, Family, Staff*).....Pg. 64
- MPS 2021-22 Educational Partners Survey Reflections (*one from each school*).....pg. 103



Report on Magnolia Public Schools' (MPS) 2021-22 Educational Partners Survey Results



April 2022

Prepared by the
MPS Home Office
Accountability Department

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Preface

Research into school effectiveness indicates that student, parent, and staff voices play a powerful role in helping schools and districts learn how to improve educational partners' school experience. Surveys have been the primary means of collecting student, parent, and staff voices about our educational partners' school experience.

Magnolia Public Schools (MPS) annually conducts student, parent, and staff surveys to improve our educational partners' school experience. Conducting such surveys is an essential part of MPS' LCAP development process. State priority 6 under LCFF asks the schools to set annual measurable outcomes about school climate:

School climate: pupil suspension rates, pupil expulsion rates, other local measures including surveys of pupils, parents and teachers on the sense of safety and school connectedness. (Priority 6)

MPS uses an online platform to provide students, parents, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and students' own strengths and weaknesses. MPS believes that students, parents, and staff have an essential role to play in informing school climate and effectiveness: this feedback instrument provides our employees with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Which Survey Tool Does MPS Use? What Do the Questions Look like?

MPS uses the *Panorama Education* online platform to conduct educational partners surveys and analyze results. Our students, parents, and staff complete the survey online ~~while parents have access to both online and paper surveys~~, in English and Spanish.

The survey questions were developed by WestEd for the California Department of Education and are used by the CORE Districts. The CORE Districts are situated in Fresno, Garden Grove, Long Beach, Los Angeles, Oakland, Sacramento, San Francisco and Santa Ana. Using the same survey enables MPS to compare its results with the average results of the CORE Districts.

Our typical timeline for educational partners survey implementation is January through mid-February, with the intent to receive results by the end of February so that we can analyze the results in March to inform our LCAP and budget development. The survey questions use Likert-type scale to measure school experience in four topics for students, parents and staff (Topics 1-4). Each topic has multiple questions that allow us to further analyze why a certain topic is rated relatively high or low. Following are the topics:

Topic 1:	Climate of Support for Academic Learning
Topic 2:	Knowledge and Fairness of Discipline, Rules and Norms
Topic 3:	Safety
Topic 4:	Sense of Belonging (School Connectedness)

In addition to the CORE Districts survey questions, MPS also asks our educational partners an overall school experience question to measure their overall satisfaction with the school.

Overall School Experience:

- **Overall, I am satisfied and would recommend this school to other students.**
- **Overall, I am satisfied and would recommend this school to other parents.**
- **Overall, I am satisfied and would recommend this school to other educators.**

To further engage our educational partners in the evaluation of their experience MPS also asks three open-ended free-response questions:

- 1) WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL?
- 2) WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL?
- 3) WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

Following are sample survey questions that MPS uses to hear student, parent, and staff voices.

Student Survey Sample Questions:

Besides many other aspects of their experience with the school, students are also asked their opinions about the support they get from the adults (teachers, school administration, the main office, and support staff), as well as their overall school satisfaction. Following are sample questions MPS asks students about the support they get.

How strongly do you agree or disagree with the following items?

- Adults at this school encourage me to work hard so I can be successful in college or at the job I choose.
- This school promotes academic success for all students.
- This school is a supportive and inviting place for students to learn.
- I feel close to people at this school.
- I am happy to be at this school.
- I feel like I am part of this school.
- I feel safe in my school.
- Adults at this school treat all students with respect.

Overall School Experience:

- **Overall, I am satisfied and would recommend this school to other students.**

Parent Survey Sample Questions:

Besides many other aspects of their experience with the school, parents are also asked their opinions about the support they get from the adults (teachers, school administration, the main office, and support staff), as well as their overall school satisfaction. Following are sample questions MPS asks parents about their experience.

How strongly do you agree or disagree with the following statements about your experience with this school this year?

- This school provides high quality instruction to my child.
- This school has high expectations for all students.
- I feel welcome to participate at this school.
- School staff treats me with respect.
- School staff takes my concerns seriously.
- School staff welcomes my suggestions.
- School staff responds to my needs in a timely manner.
- School staff is helpful.
- My child's background (race, ethnicity, religion, economic status) is valued at this school.

Overall School Experience:

- **Overall, I am satisfied and would recommend this school to other parents.**

Staff Survey Sample Questions:

Besides many other aspects of their experience with the school, staff are also asked their opinions about the support they get from other adults (teachers, school administration, the main office, and support staff), as well as their overall school satisfaction. Following are sample questions MPS asks staff about their experience.

Please rate how strongly you agree or disagree with following statements about this school.

- This school is a supportive and inviting place for students to learn.
- This school promotes academic success for all students.
- This school emphasizes helping students academically when they need it.
- ...

Please respond to the following questions about the adults in this school.

- How many adults at this school have close professional relationships with one another?
- How many adults at this school support and treat each other with respect?
- How many adults at this school feel a responsibility to improve this school?

For the following questions, please indicate how much you agree or disagree with following statements about this school.

- This school is a supportive and inviting place for staff to work.
- This school promotes trust and collegiality among staff.
- This school promotes personnel participation in decision-making that affects school practices and policies.

Overall School Experience:

- **Overall, I am satisfied and would recommend this school to other educators.**

Is the Student Survey a Social Emotional Learning (SEL) Survey?

As described in the section above, the annual educational partners survey includes questions about students' experience in four topics: Climate of Support for Academic Learning, Knowledge and Fairness of Discipline, Rules and Norms, Safety, and Sense of Belonging (School Connectedness). While students' social-emotional competencies may impact student response to the questions in those topics, the primary intent of the survey is to learn about students' experience with different aspects of the school and the support they get from adults (teachers, school administration, the main office, and support staff), as well as their overall school satisfaction. Separate than the annual educational partners experience survey, our "students" also take the CORE DISTRICTS **Social Emotional Learning (SEL) survey** in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

Topic 5:	Growth Mindset
Topic 6:	Self-Efficacy
Topic 7:	Self-Management
Topic 8:	Social Awareness

As part of our MTSS efforts school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This report is about the annual educational partners experience survey results and our reflections on it. Schools write their reflections on the student SEL surveys at a separate time in fall and spring.

What Are the Participation Rates on the Surveys?

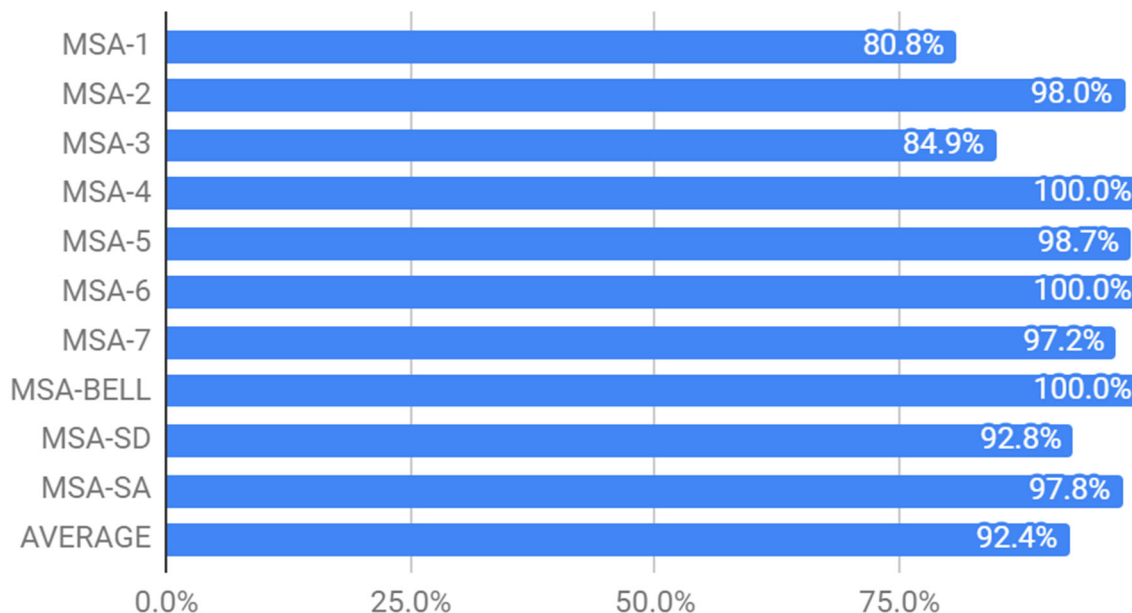
Current Year Survey Participation Rates

In 2021-22, MPS had an average educational partners participation rate of **92.4%** for students, **57.1%** for families, and **97.8%** for staff. (Last year the participation rates were 93.3%, 79.6%, and 100.0% respectively.)

2021-22 Survey Participation Rates									
	Students			Families			Staff		
MSA-1	80.8%	597	739	13.8%	86	622	86.6%	58	67
MSA-2	98.0%	489	499	86.3%	366	424	100.0%	42	42
MSA-3	84.9%	342	403	37.3%	122	327	97.5%	39	40
MSA-4	100.0%	109	109	95.8%	91	95	100.0%	18	18
MSA-5	98.7%	236	239	70.8%	138	195	100.0%	23	23
MSA-6	100.0%	87	87	100.0%	75	75	100.0%	12	12
MSA-7	97.2%	139	143	51.7%	107	207	90.9%	30	33
MSA-BELL	100.0%	384	384	54.3%	194	357	100.0%	43	43
MSA-SD	92.8%	386	416	71.1%	271	381	100.0%	34	34
MSA-SA	97.8%	401	410	81.8%	269	329	100.0%	57	57
AVERAGE	92.4%	3,170	3,429	57.1%	1,719	3,012	97.8%	356	364

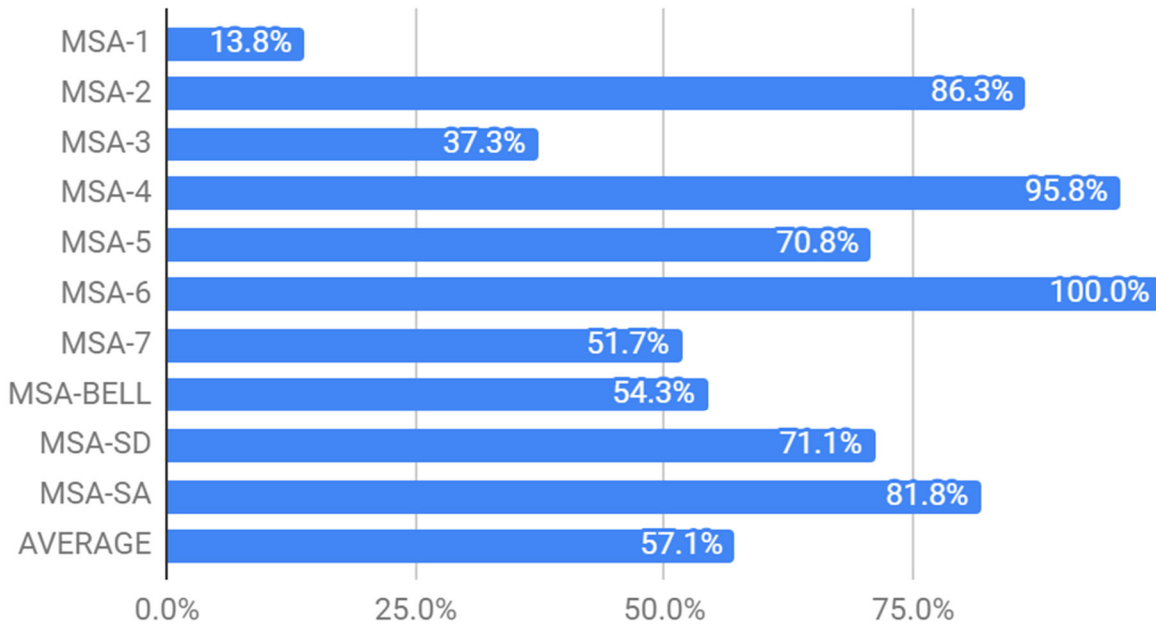
Students

2021-22 Survey Participation Rates - Students



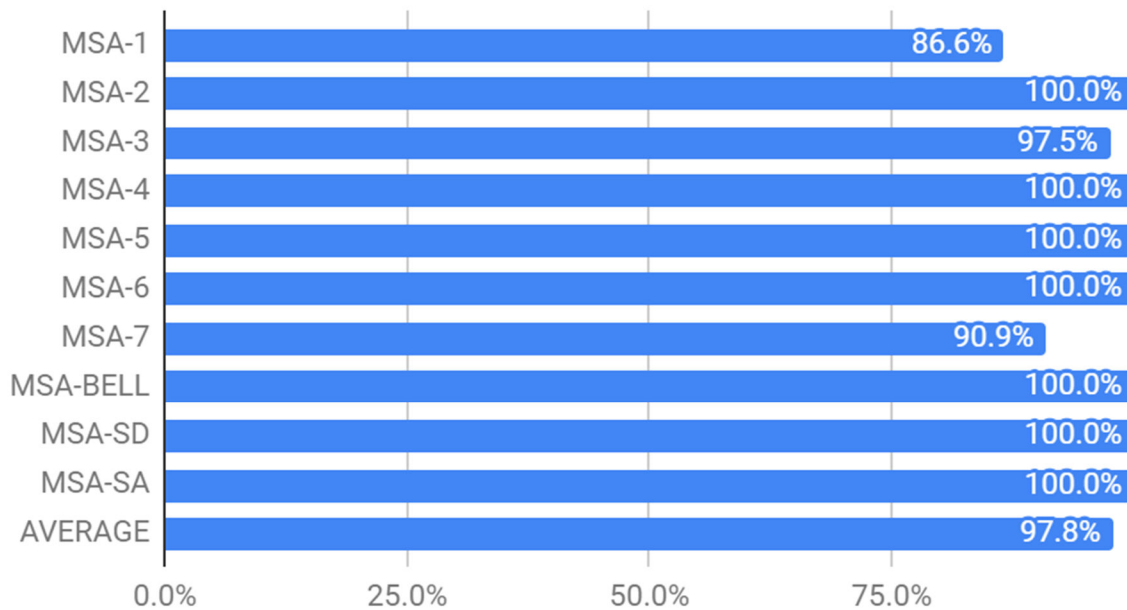
Families

2021-22 Survey Participation Rates - Families



Staff

2021-22 Survey Participation Rates - Staff



Changes in Survey Participation Rates From Prior Year

The following table shows a comparison of the current and prior year survey participation rates. Most schools experienced an increase in their survey participation rates. Each school sets an expected participation rate in their LCAP as a target. The table below also shows that the majority of our schools met their LCAP survey participation targets.

Survey Participation Rates: 2021-22 vs. 2020-21															
	Students					Families					Staff				
	2020-21	2021-22	Change	2021-22 LCAP Target	Met?	2020-21	2021-22	Change	2021-22 LCAP Target	Met?	2020-21	2021-22	Change	2021-22 LCAP Target	Met?
MSA-1	91.5%	80.8%	-10.7%	95.0%	No	100.0%	13.8%	-86.2%	90.0%	No	100.0%	86.6%	-13.4%	100.0%	No
MSA-2	95.1%	98.0%	2.9%	95.0%	Yes	91.8%	86.3%	-5.5%	90.0%	No	100.0%	100.0%	0.0%	100.0%	Yes
MSA-3	83.1%	84.9%	1.8%	95.0%	No	87.1%	37.3%	-49.8%	90.0%	No	100.0%	97.5%	-2.5%	100.0%	No
MSA-4	100.0%	100.0%	0.0%	95.0%	Yes	83.3%	95.8%	12.5%	80.0%	Yes	100.0%	100.0%	0.0%	100.0%	Yes
MSA-5	98.3%	98.7%	0.4%	95.0%	Yes	96.8%	70.8%	-26.0%	90.0%	No	100.0%	100.0%	0.0%	100.0%	Yes
MSA-6	99.4%	100.0%	0.6%	95.0%	Yes	88.7%	100.0%	11.3%	90.0%	Yes	100.0%	100.0%	0.0%	100.0%	Yes
MSA-7	92.3%	97.2%	4.9%	95.0%	Yes	65.4%	51.7%	-13.7%	80.0%	No	100.0%	90.9%	-9.1%	100.0%	No
MSA-BELL	94.1%	100.0%	5.9%	95.0%	Yes	41.5%	54.3%	12.8%	80.0%	No	100.0%	100.0%	0.0%	100.0%	Yes
MSA-SD	94.7%	92.8%	-1.9%	85.0%	Yes	67.9%	71.1%	3.2%	63.0%	Yes	100.0%	100.0%	0.0%	85.0%	Yes
MSA-SA	95.3%	97.8%	2.5%	95.0%	Yes	72.8%	81.8%	9.0%	75.0%	Yes	100.0%	100.0%	0.0%	100.0%	Yes
AVERAGE	93.3%	92.4%	-0.9%	95.0%		79.6%	57.1%	-22.5%	85.0%		100.0%	97.8%	-2.2%	100.0%	

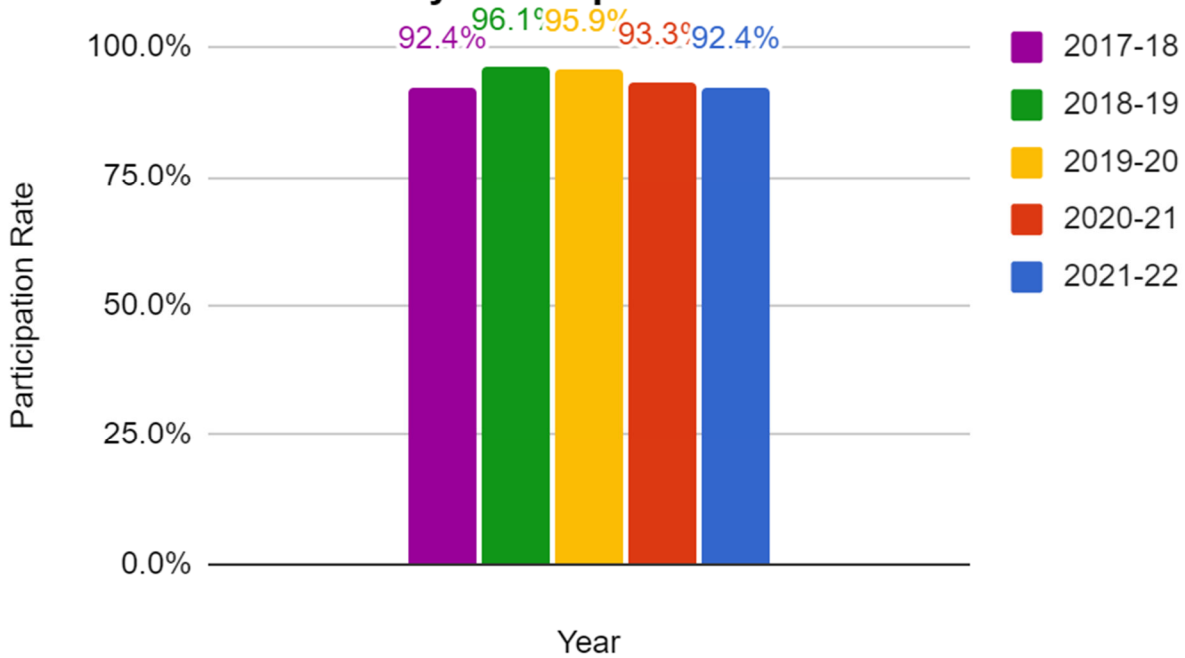
Historical Survey Participation Rates

Considering the last five years, MPS has an upward trend in survey participation. The following tables and figures show the survey participation rates by students, families, and staff over the years.

Students

MPS Historical Survey Participation Rates - Students					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	93.2%	100.0%	91.4%	91.5%	80.8%
MSA-2	88.9%	97.0%	99.3%	95.1%	98.0%
MSA-3	86.3%	96.8%	93.7%	83.1%	84.9%
MSA-4	97.8%	80.7%	96.9%	100.0%	100.0%
MSA-5	96.7%	99.6%	100.0%	98.3%	98.7%
MSA-6	99.4%	100.0%	100.0%	99.4%	100.0%
MSA-7	98.7%	99.1%	98.2%	92.3%	97.2%
MSA-BELL	100.0%	100.0%	97.0%	94.1%	100.0%
MSA-SD	88.7%	89.2%	94.7%	94.7%	92.8%
MSA-SA	88.5%	93.6%	97.1%	95.3%	97.8%
AVERAGE	92.4%	96.1%	95.9%	93.3%	92.4%

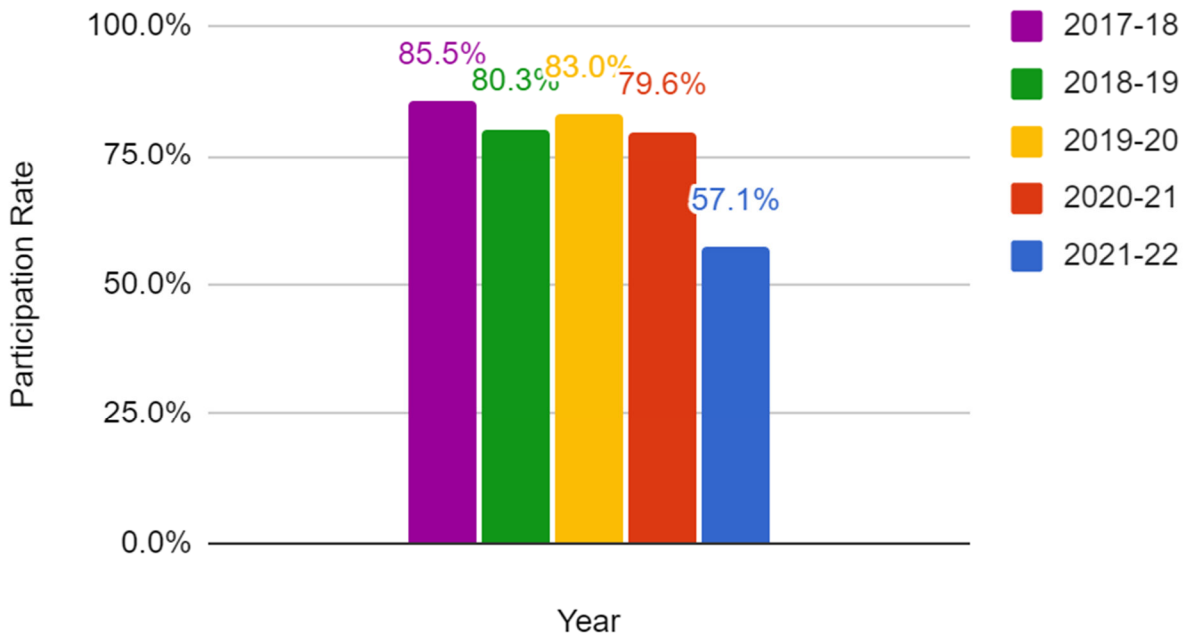
MPS Historical Survey Participation Rates - Students



Families

MPS Historical Survey Participation Rates - Families					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	94.8%	72.3%	85.1%	100.0%	13.8%
MSA-2	100.0%	100.0%	85.8%	91.8%	86.3%
MSA-3	90.7%	100.0%	61.9%	87.1%	37.3%
MSA-4	28.4%	18.1%	66.7%	83.3%	95.8%
MSA-5	96.2%	100.0%	87.3%	96.8%	70.8%
MSA-6	84.2%	86.8%	88.9%	88.7%	100.0%
MSA-7	98.3%	83.3%	99.6%	65.4%	51.7%
MSA-BELL	100.0%	95.4%	87.3%	41.5%	54.3%
MSA-SD	51.9%	55.4%	64.9%	67.9%	71.1%
MSA-SA	70.7%	62.1%	100.0%	72.8%	81.8%
AVERAGE	85.5%	80.3%	83.0%	79.6%	57.1%

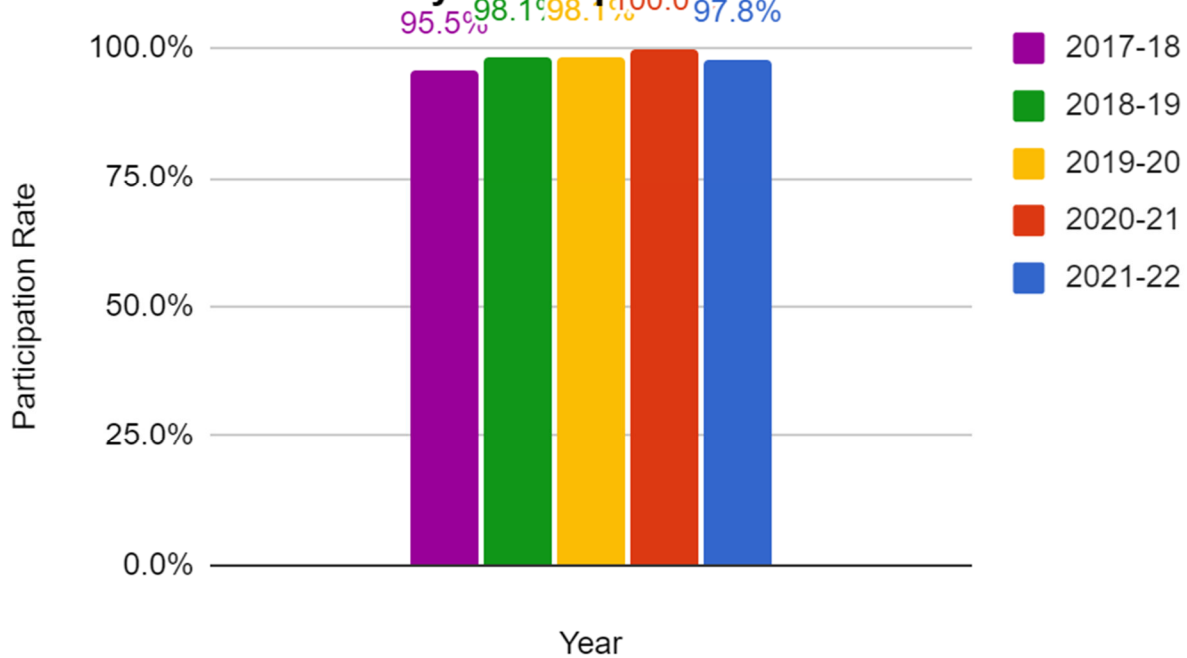
MPS Historical Survey Participation Rates - Families



Staff

MPS Historical Survey Participation Rates - Staff					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	97.6%	100.0%	98.1%	100.0%	86.6%
MSA-2	94.7%	100.0%	100.0%	100.0%	100.0%
MSA-3	100.0%	100.0%	97.8%	100.0%	97.5%
MSA-4	100.0%	100.0%	100.0%	100.0%	100.0%
MSA-5	100.0%	100.0%	100.0%	100.0%	100.0%
MSA-6	100.0%	100.0%	100.0%	100.0%	100.0%
MSA-7	90.0%	100.0%	90.3%	100.0%	90.9%
MSA-BELL	100.0%	100.0%	100.0%	100.0%	100.0%
MSA-SD	86.7%	88.2%	96.9%	100.0%	100.0%
MSA-SA	91.4%	96.3%	98.5%	100.0%	100.0%
AVERAGE	95.5%	98.1%	98.1%	100.0%	97.8%

MPS Historical Survey Participation Rates - Staff



What Are the Approval Rates on the Surveys?

Current Year Survey Approval Rates

In 2021-22, MPS had an average educational partners approval rate of **68%** for students; **96%** for parents; **85%** for staff. (Last year the average approval rates were 75%, 97%, and 91% respectively.)

AVERAGE APPROVAL rates are based on our educational partners' responses to all questions on the survey.

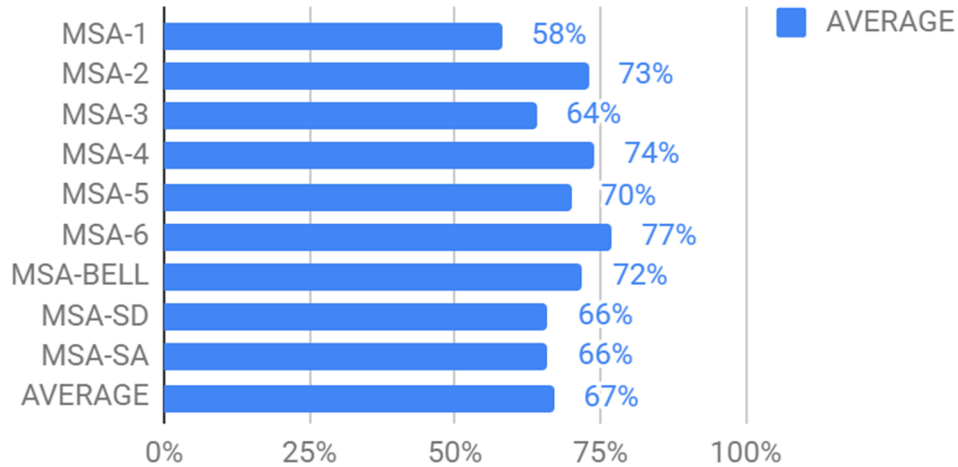
Students

Students had an average approval rate of **68%** compared to 75% last year.

2021-22 Secondary Student Survey Summary - Percent Favorable						
	AVERAGE	Topic 1	Topic 2	Topic 3	Topic 4	OVERALL SATISF
MSA-1	58%	65%	54%	62%	47%	66%
MSA-2	73%	80%	67%	76%	65%	88%
MSA-3	64%	70%	60%	70%	54%	76%
MSA-4	74%	81%	70%	80%	58%	82%
MSA-5	70%	79%	70%	70%	56%	81%
MSA-6	77%	85%	77%	75%	65%	91%
MSA-BELL	72%	83%	72%	69%	62%	86%
MSA-SD	66%	77%	65%	61%	63%	78%
MSA-SA	66%	75%	60%	71%	58%	69%
AVERAGE	67%	75%	64%	69%	58%	78%
2021-22 Elementary Student Survey Summary - Percent Favorable						
	AVERAGE	Topic 1	Topic 2	Topic 3	Topic 4	OVERALL SATISF
MSA-7	77%	80%	78%	71%	79%	88%
MSA-SA	79%	84%	85%	70%	79%	89%
AVERAGE	78%	82%	81%	70%	79%	88%
2021-22 Combined Student Survey Summary - Percent Favorable						
	AVERAGE	Topic 1	Topic 2	Topic 3	Topic 4	OVERALL SATISF
MSA-SA	70%	78%	67%	71%	64%	75%
MPS	68%	76%	65%	69%	60%	79%

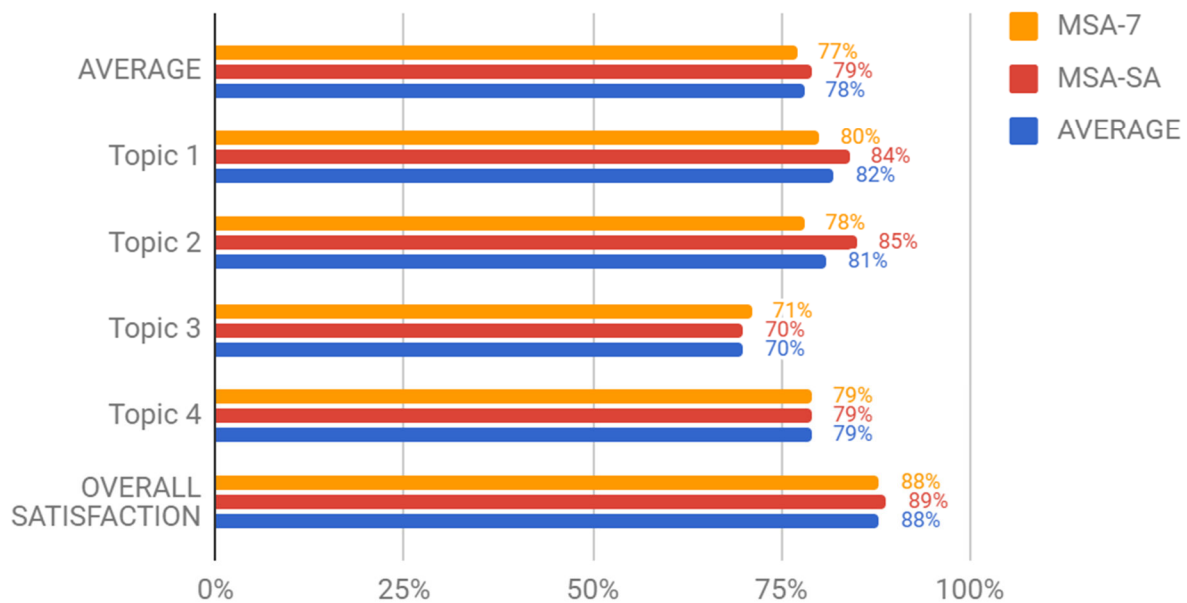
Students - Secondary

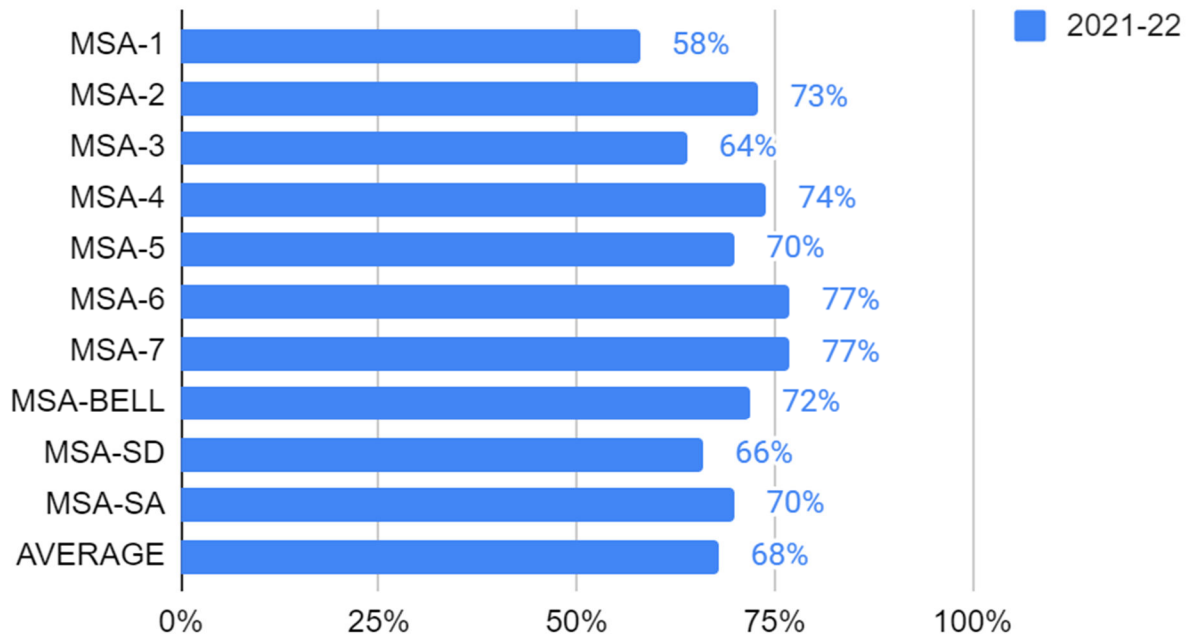
2021-22 SECONDARY STUDENT SURVEY - AVERAGE APPROVAL



Students - Elementary

2021-22 ELEMENTARY STUDENT SURVEY - MSA-7, MSA-SA and MPS AVERAGE



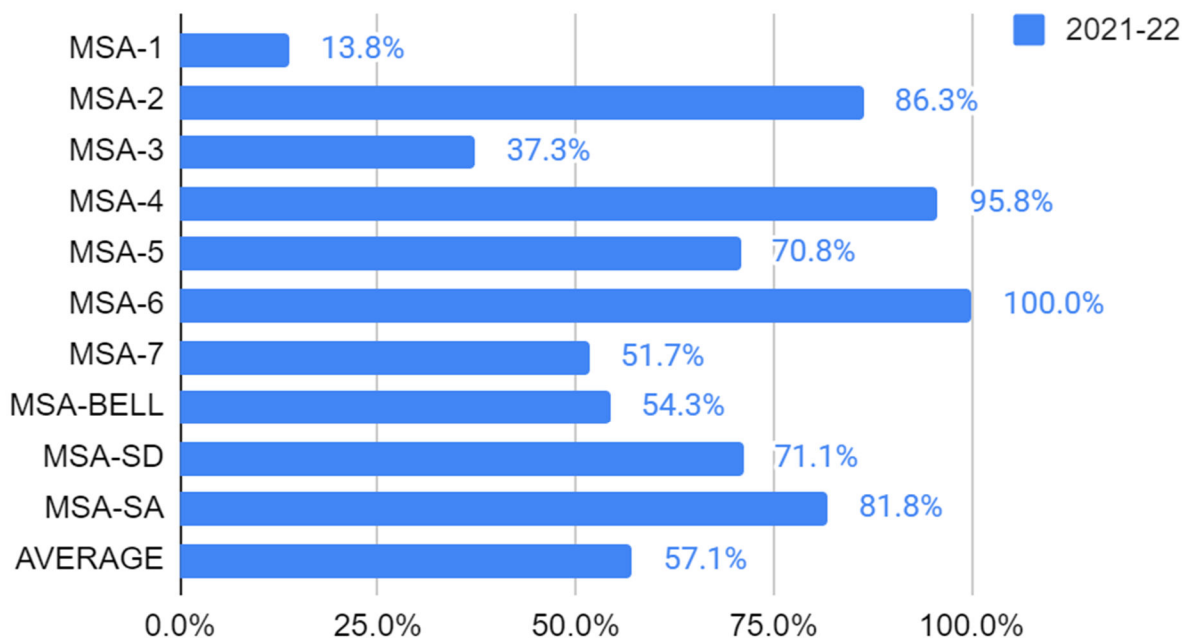
Students - Combined**2021-22 MPS Survey Average Approval Rates - Students**

Families

Families had an average approval rate of **96%** compared to 97% last year.

2021-22 Family Survey Summary - Percent Favorable						
	AVERAGE	Topic 1	Topic 2	Topic 3	Topic 4	OVERALL SATISF
MSA-1	91%	97%	90%	76%	94%	95%
MSA-2	97%	98%	97%	96%	97%	97%
MSA-3	96%	97%	95%	94%	97%	96%
MSA-4	98%	98%	98%	97%	98%	97%
MSA-5	96%	98%	97%	90%	96%	97%
MSA-6	99%	100%	98%	96%	100%	100%
MSA-7	98%	97%	97%	99%	98%	98%
MSA-BELL	96%	98%	93%	95%	96%	96%
MSA-SD	96%	97%	93%	97%	96%	96%
MSA-SA	94%	96%	92%	88%	95%	94%
AVERAGE	96%	98%	95%	93%	96%	96%

2021-22 MPS Survey Participation Rates - Families

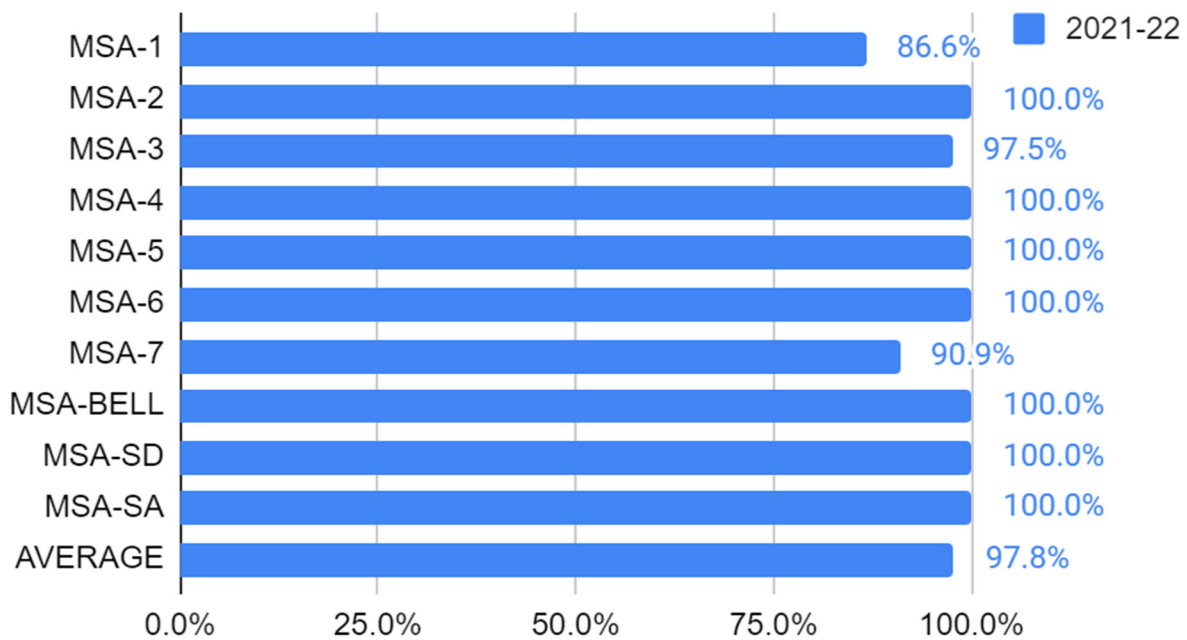


Staff

Staff had an average approval rate of **85%** compared to 91% last year.

2021-22 Staff Survey Summary - Percent Favorable						
	AVERAGE	Topic 1	Topic 2	Topic 3	Topic 4	OVERALL SATIS
MSA-1	73%	92%	74%	61%	66%	74%
MSA-2	85%	95%	77%	76%	92%	98%
MSA-3	80%	90%	85%	63%	76%	87%
MSA-4	89%	97%	89%	74%	91%	100%
MSA-5	92%	96%	98%	89%	83%	96%
MSA-6	97%	96%	99%	93%	97%	92%
MSA-7	93%	98%	97%	92%	83%	90%
MSA-BELL	84%	96%	82%	78%	81%	93%
MSA-SD	92%	100%	90%	80%	96%	100%
MSA-SA	88%	95%	89%	80%	86%	91%
AVERAGE	85%	95%	85%	76%	83%	90%

2021-22 MPS Survey Participation Rates - Staff



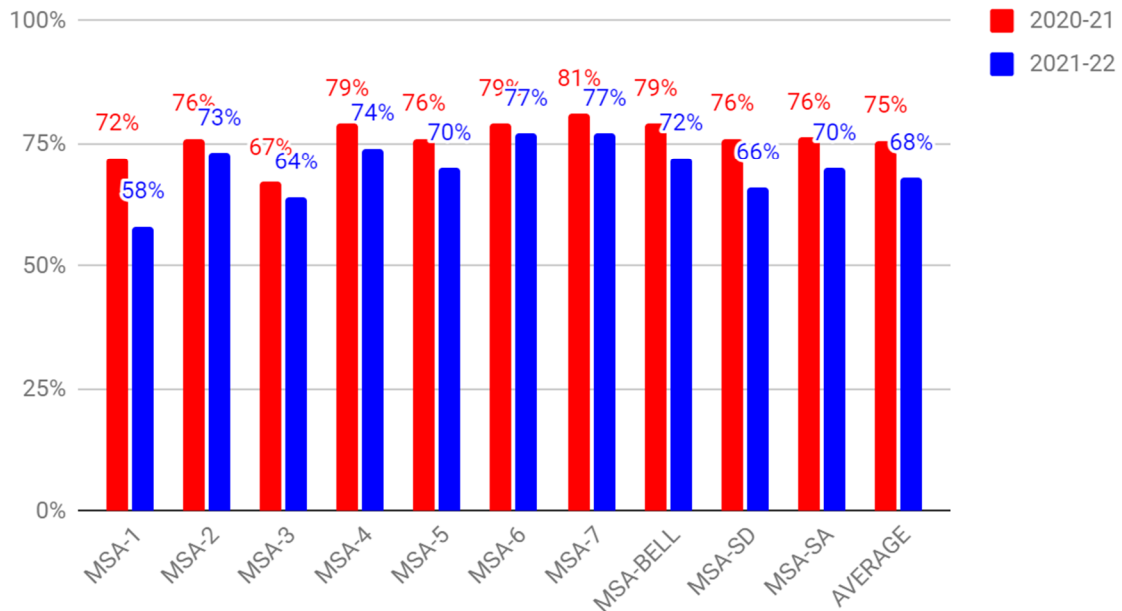
Changes in Survey Approval Rates From Prior Year

The following tables and figures show a comparison of the current and prior year survey approval rates. ~~Most schools experienced an increase in their survey approval rates.~~ Each school sets an expected approval rate in their LCAP as a target. The tables below also show that the majority of our schools met their LCAP survey approval targets.

Students

AVERAGE APPROVAL Rates: 2021-22 vs. 2020-21					
	Students				
	2020-21	2021-22	Change	2021-22 LCAP Target	Met?
MSA-1	72%	58%	-14%	73%	No
MSA-2	76%	73%	-3%	75%	No
MSA-3	67%	64%	-3%	68%	No
MSA-4	79%	74%	-5%	80%	No
MSA-5	76%	70%	-6%	75%	No
MSA-6	79%	77%	-2%	80%	No
MSA-7	81%	77%	-4%	80%	No
MSA-BELL	79%	72%	-7%	80%	No
MSA-SD	76%	66%	-10%	70%	No
MSA-SA	76%	70%	-6%	75%	No
AVERAGE	75%	68%	-7%	75%	

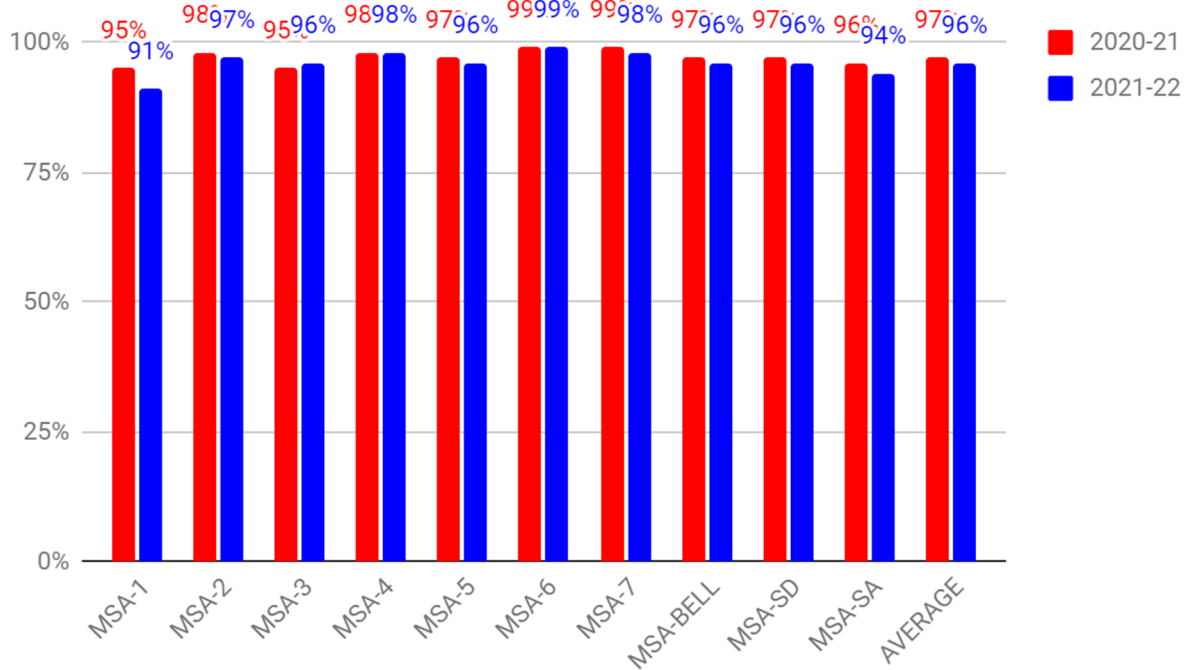
2021-22 vs. 2020-21 AVERAGE APPROVAL RATES - STUDENTS



Families

AVERAGE APPROVAL Rates: 2021-22 vs. 2020-21					
	Family				
	2020-21	2021-22	Change	2021-22 LCAP Target	Met?
MSA-1	95%	91%	-4%	95%	No
MSA-2	98%	97%	-1%	95%	Yes
MSA-3	95%	96%	1%	95%	Yes
MSA-4	98%	98%	0%	95%	Yes
MSA-5	97%	96%	-1%	95%	Yes
MSA-6	99%	99%	0%	95%	Yes
MSA-7	99%	98%	-1%	99%	No
MSA-BELL	97%	96%	-1%	95%	Yes
MSA-SD	97%	96%	-1%	80%	Yes
MSA-SA	96%	94%	-2%	95%	No
AVERAGE	97%	96%	-1%	95%	

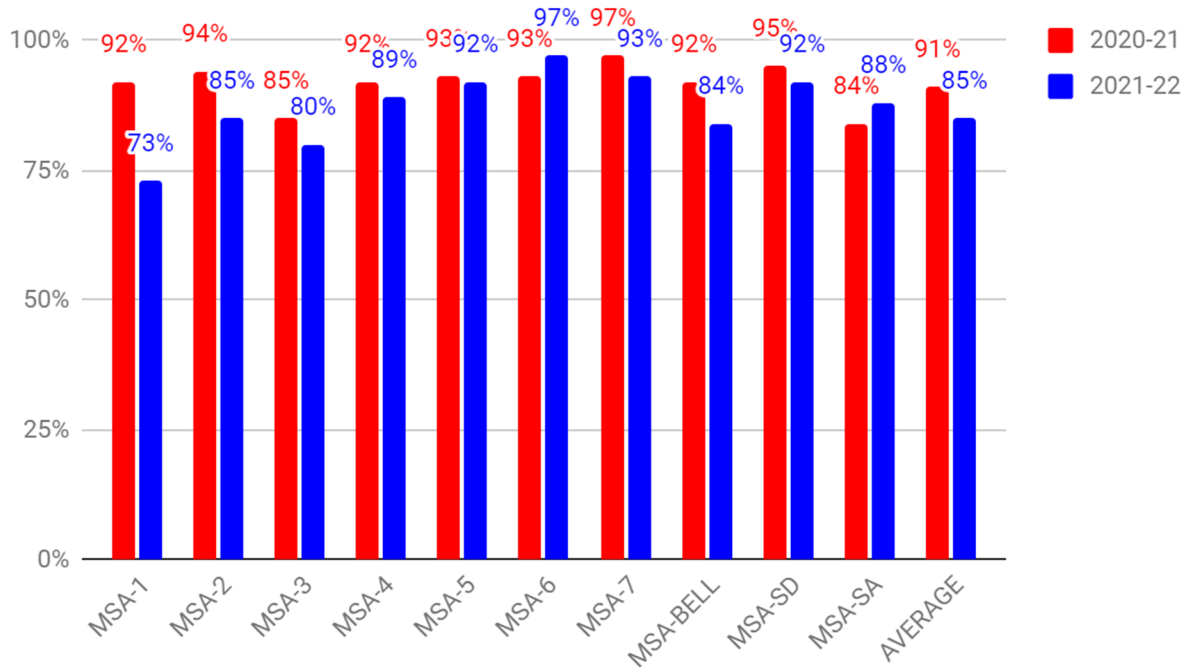
2021-22 vs. 2020-21 AVERAGE APPROVAL RATES - FAMILY



Staff

AVERAGE APPROVAL Rates: 2021-22 vs. 2020-21					
	Staff			2021-22 LCAP Target	Met?
	2020-21	2021-22	Change		
MSA-1	92%	73%	-19%	90%	No
MSA-2	94%	85%	-9%	90%	No
MSA-3	85%	80%	-5%	85%	No
MSA-4	92%	89%	-3%	90%	No
MSA-5	93%	92%	-1%	90%	Yes
MSA-6	93%	97%	4%	90%	Yes
MSA-7	97%	93%	-4%	95%	No
MSA-BELL	92%	84%	-8%	90%	No
MSA-SD	95%	92%	-3%	80%	Yes
MSA-SA	84%	88%	4%	85%	Yes
AVERAGE	91%	85%	-6%	85%	

2021-22 vs. 2020-21 AVERAGE APPROVAL RATES - STAFF



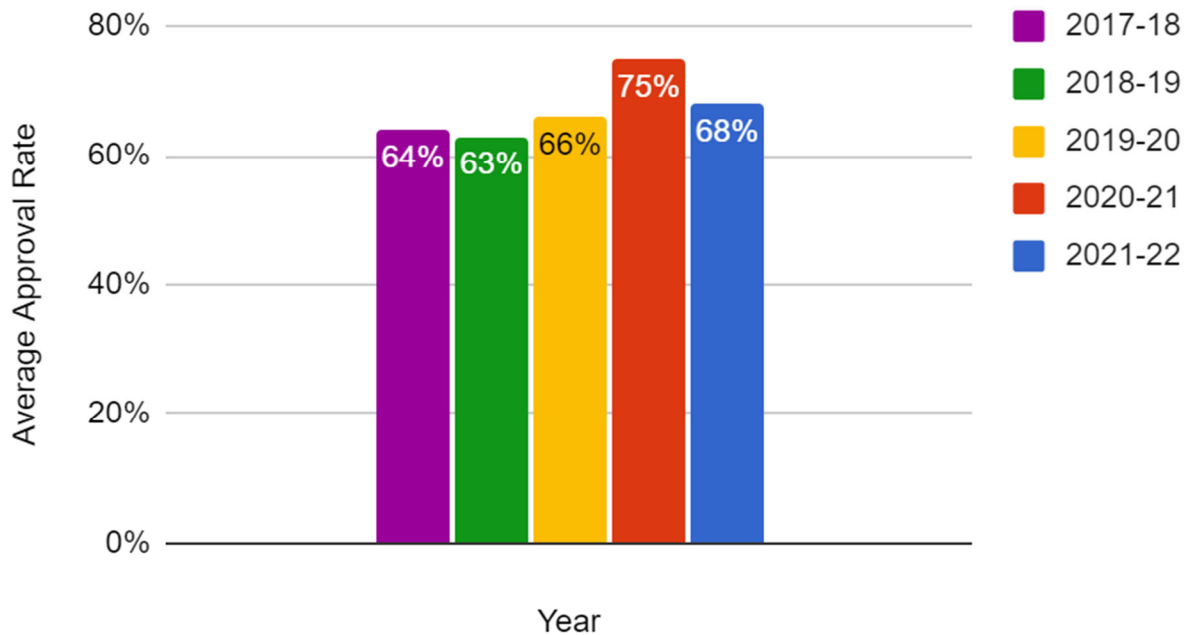
Historical Survey Approval Rates

Considering the last five years, MPS has an upward trend in survey approval rates. The following tables and figures show the survey approval rates by students, families, and staff over the years.

Students

MPS Historical Survey Average Approval Rates - Students					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	62%	66%	62%	72%	58%
MSA-2	60%	63%	70%	76%	73%
MSA-3	59%	56%	54%	67%	64%
MSA-4	65%	58%	64%	79%	74%
MSA-5	64%	72%	67%	76%	70%
MSA-6	62%	70%	68%	79%	77%
MSA-7	69%	75%	74%	81%	77%
MSA-BELL	68%	71%	70%	79%	72%
MSA-SD	66%	53%	62%	76%	66%
MSA-SA	61%	59%	72%	76%	70%
AVERAGE	64%	63%	66%	75%	68%

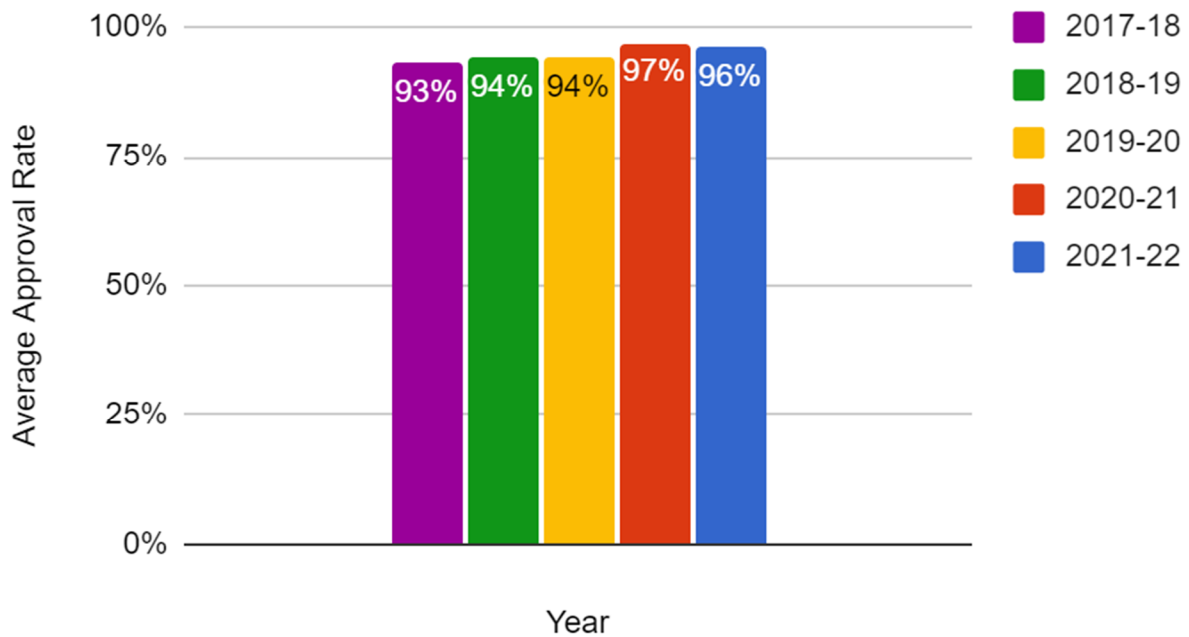
MPS Historical Survey Average Approval Rates - Students



Families

MPS Historical Survey Average Approval Rates - Families					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	91%	95%	94%	95%	91%
MSA-2	91%	94%	93%	98%	97%
MSA-3	91%	91%	84%	95%	96%
MSA-4	98%	94%	95%	98%	98%
MSA-5	97%	96%	96%	97%	96%
MSA-6	97%	96%	99%	99%	99%
MSA-7	98%	98%	98%	99%	98%
MSA-BELL	96%	94%	96%	97%	96%
MSA-SD	92%	95%	96%	97%	96%
MSA-SA	88%	89%	94%	96%	94%
AVERAGE	93%	94%	94%	97%	96%

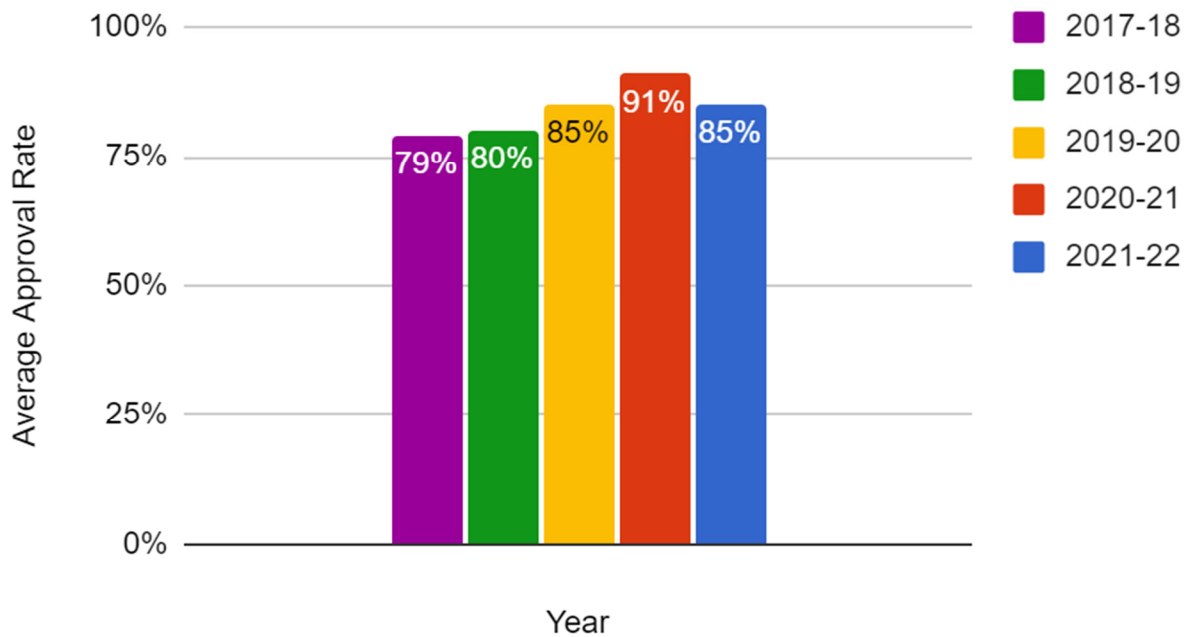
MPS Historical Survey Average Approval Rates - Families



Staff

MPS Historical Survey Average Approval Rates - Staff					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	86%	81%	82%	92%	73%
MSA-2	73%	73%	89%	94%	85%
MSA-3	72%	69%	65%	85%	80%
MSA-4	80%	71%	75%	92%	89%
MSA-5	93%	93%	91%	93%	92%
MSA-6	95%	94%	95%	93%	97%
MSA-7	92%	95%	93%	97%	93%
MSA-BELL	78%	86%	88%	92%	84%
MSA-SD	84%	85%	90%	95%	92%
MSA-SA	64%	72%	86%	84%	88%
AVERAGE	79%	80%	85%	91%	85%

MPS Historical Survey Average Approval Rates - Staff

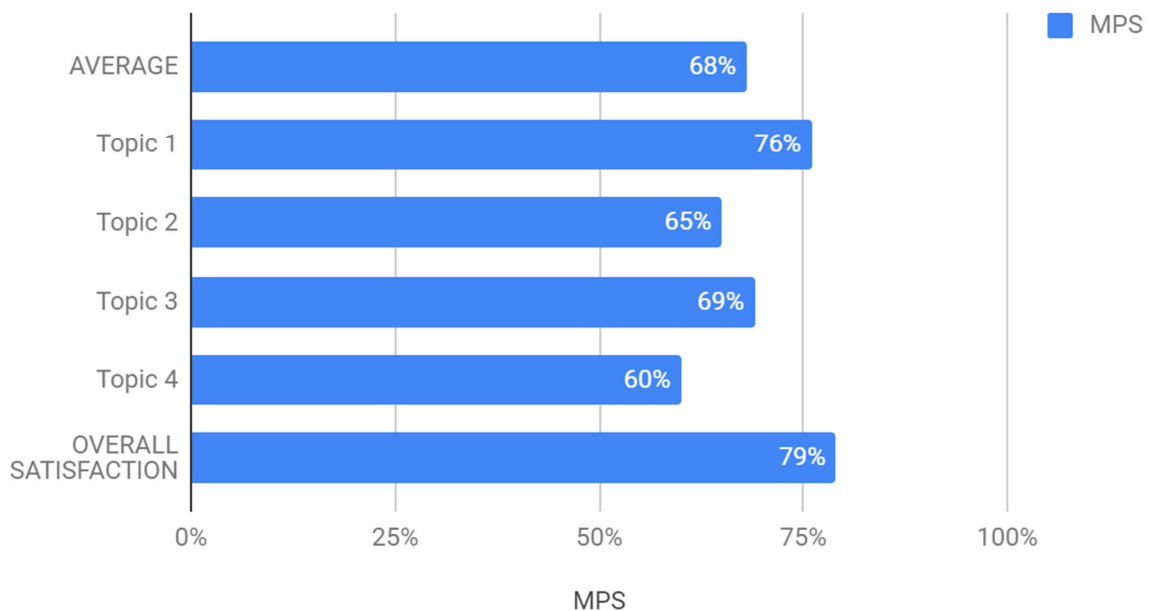


How About Approval Rates for Each Topic?

Average approval rates in the above section were based on our educational partners' responses to all questions on the survey. It provides an overall percentage for the whole survey instrument. However, it is important for us to analyze how educational partners responded to each topic and question. The tables and figures below show average approval rates for each survey topic. The **attachment** titled, "**Panorama 2021-22 MPS Average Approval Rates by Question**" provides average approval rates by question.

Students - Combined

2021-22 ELEMENTARY & SECONDARY COMBINED STUDENT SURVEY SUMMARY BY TOPIC

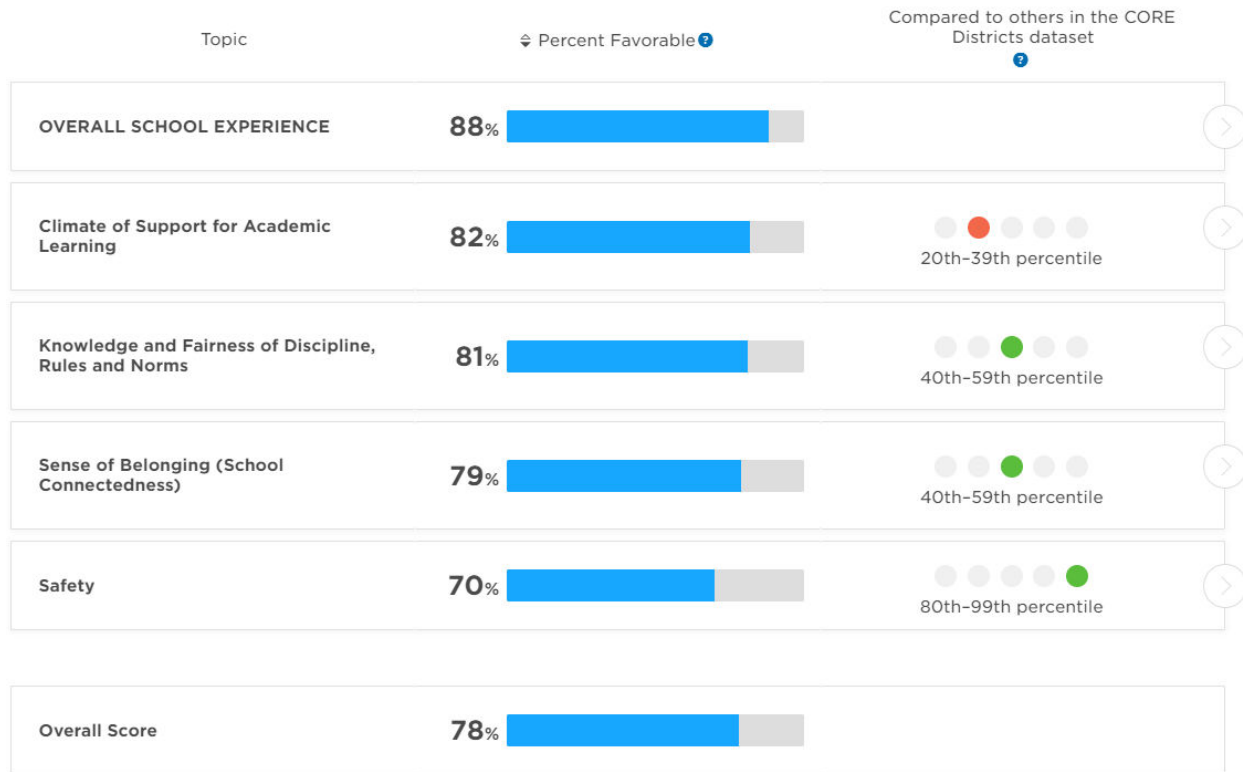


Students – Elementary

Elementary Student Survey

252 responses | [show breakdown](#)

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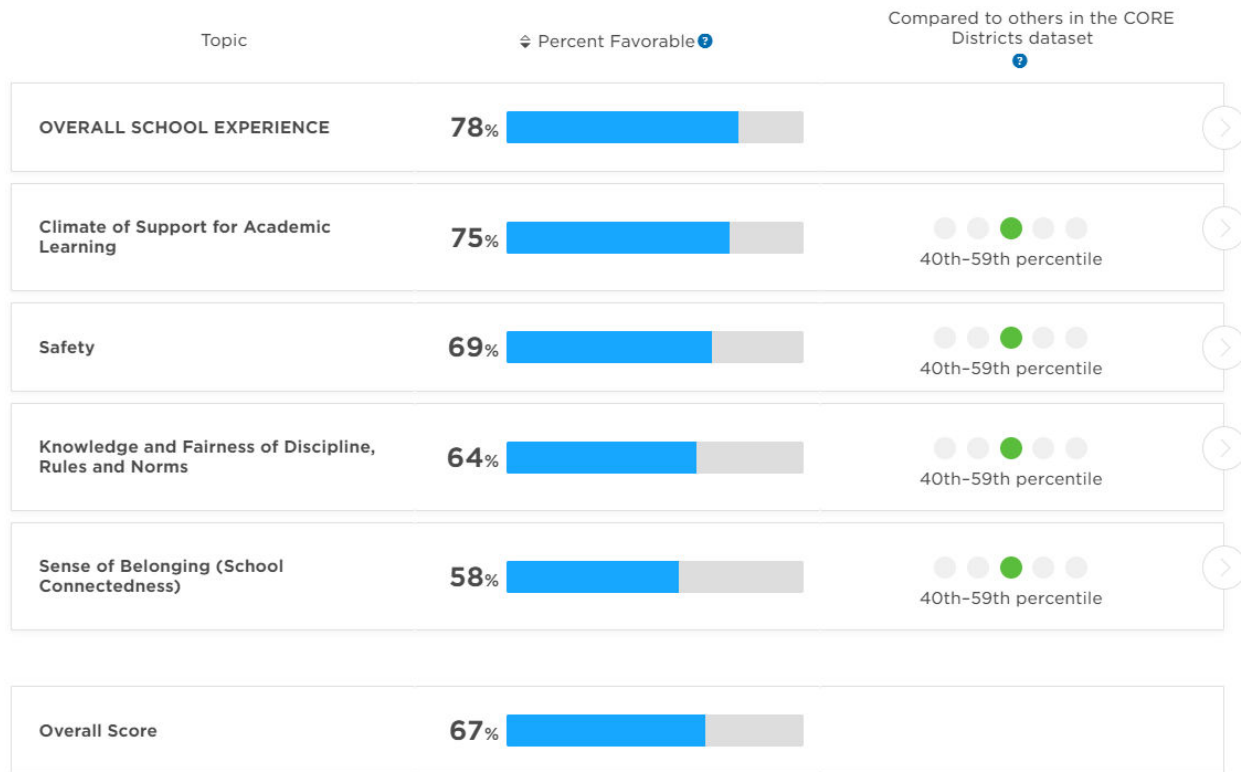


Students – Secondary

Secondary Student Survey

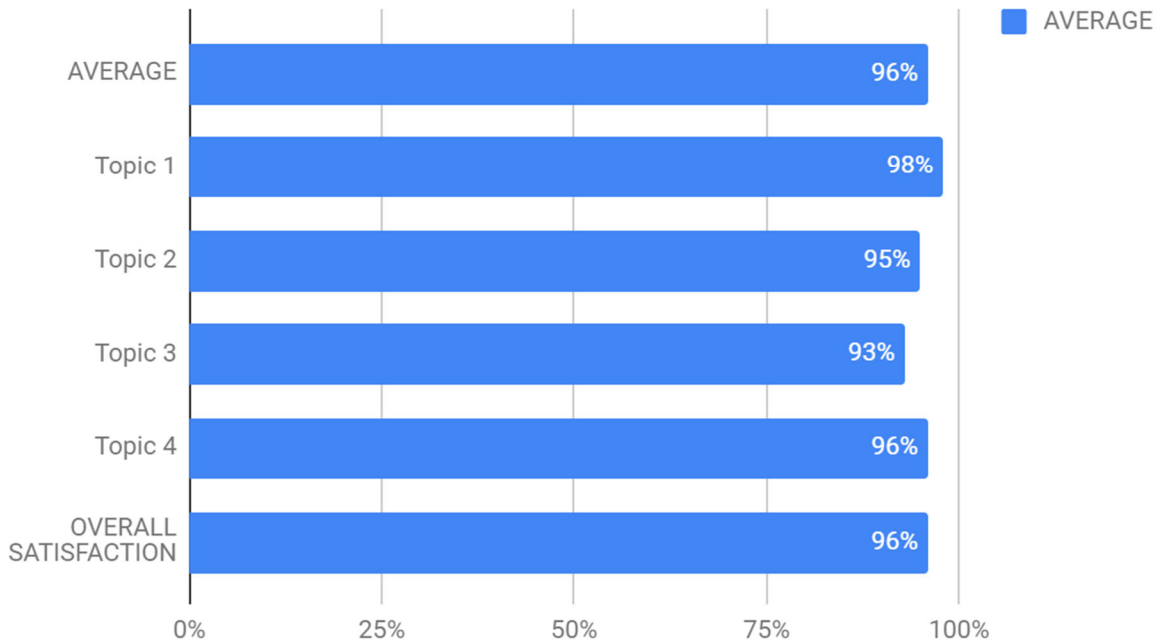
2,918 responses | [show breakdown](#)

Save as PDF



Families

2021-22 Family Survey Summary - MPS Averages by Topic



Family Survey

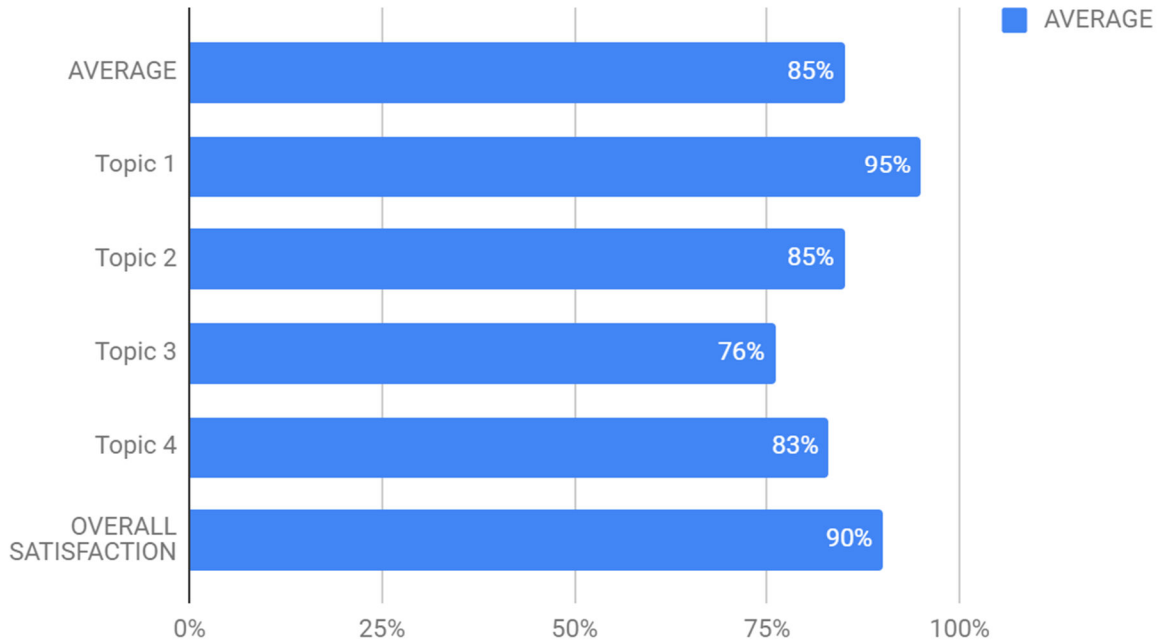
1,934 responses | [show breakdown](#)

[Save as PDF](#)

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021
Climate of Support for Academic Learning	98%	80th-99th percentile	▲ 1 Greatest increase
OVERALL SCHOOL EXPERIENCE	96%		▼ 2
Sense of Belonging (School Connectedness)	96%	80th-99th percentile	▼ 1
Knowledge and Fairness of Discipline, Rules and Norms	95%	60th-79th percentile	▼ 2
Safety	93%	60th-79th percentile	▼ 1
Overall Score	96%		

Staff

2021-22 Staff Survey Summary - MPS Averages by Topic



Staff Survey

356 responses | [show breakdown](#)

[Save as PDF](#)

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021
Climate of Support for Academic Learning	95%	40th-59th percentile	1
OVERALL SCHOOL EXPERIENCE	90%		4
Knowledge and Fairness of Discipline, Rules and Norms	85%	40th-59th percentile	8
Sense of Belonging (School Connectedness)	83%	40th-59th percentile	2
Safety	76%	40th-59th percentile	13
Overall Score	85%		

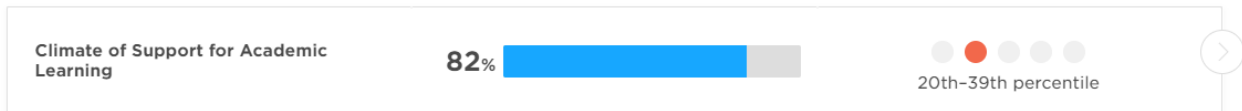
Which Topics and Questions Were Rated the Highest and Lowest?

Approval Ratings by Topic & Question

Please see the **attachments** for detailed reports on approval ratings by topic and question. For simplicity, we will include here the highest and lowest rated topics and questions.

Students - Elementary

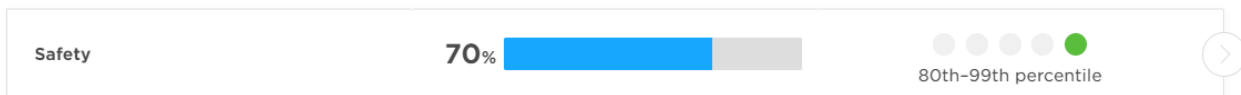
Highest Rated Topic:



Highest Rated Questions:

QUESTION Does this school help all students be successful in school?	92% responded favorably	
QUESTION Do teachers and other grown-ups at school treat students with respect?	90% responded favorably	
QUESTION Are the school rules fair?	89% responded favorably	

Lowest Rated Topic:




Lowest Rated Questions:

- QUESTION


> Do other kids at school spread mean rumors or lies about you?

63%ⁱ
responded favorably


- QUESTION


> Do other kids hit or push you at school when they are not just playing around?

61%ⁱ
responded favorably


- QUESTION

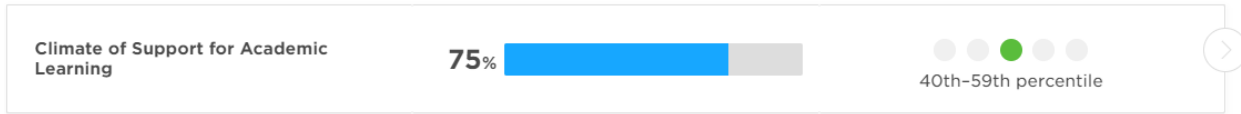
> Are you afraid of being beaten up at school?

58%ⁱ
responded favorably



Students - Secondary

Highest Rated Topic:



Highest Rated Questions:

- QUESTION

Teachers give students a chance to take part in classroom discussions or activities. **83%** responded favorably
- QUESTION

Been afraid of being beaten up? **82%** responded favorably
- QUESTION

This school clearly informs students what would happen if they break school rules. **79%** responded favorably

Lowest Rated Topic:



Lowest Rated Questions:

- QUESTION

All students are treated fairly when they break school rules. **52%** responded favorably
- QUESTION

I feel like I am part of this school. **52%** responded favorably
- QUESTION

Students treat teachers with respect. **39%** responded favorably

Families

Highest Rated Topic:



Highest Rated Questions:

- QUESTION: School staff is helpful. 98% responded favorably, 0 from Spring 2021.
- QUESTION: School staff treats me with respect. 98% responded favorably, 0 from Spring 2021.
- QUESTION: This school provides high quality instruction to my child. 98% responded favorably, 1 from Spring 2021.

Lowest Rated Topic:

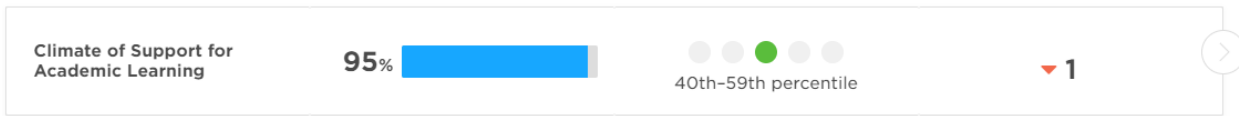


Lowest Rated Questions:

- QUESTION: School staff welcomes my suggestions. 95% responded favorably, 2 from Spring 2021.
- QUESTION: At this school, discipline is fair. 93% responded favorably, 2 from Spring 2021.
- QUESTION: My child is safe in the neighborhood around the school. 91% responded favorably, 0 from Spring 2021.

Staff

Highest Rated Topic:



Highest Rated Questions:

- QUESTION

emphasizes helping students academically when they need it.

99% responded favorably

0 from Spring 2021
- QUESTION

The school rules are fair.

97% responded favorably

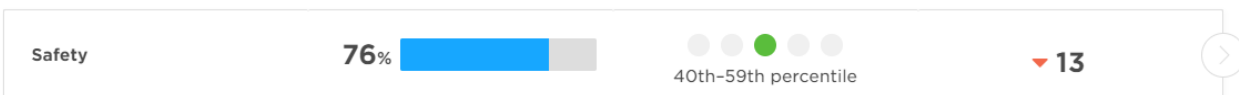
▼ 2 from Spring 2021
- QUESTION

is a supportive and inviting place for students to learn.

97% responded favorably

▼ 1 from Spring 2021

Lowest Rated Topic:



Lowest Rated Questions:

- QUESTION

lack of respect of staff by students?

70% responded favorably

▼ 17 from Spring 2021
- QUESTION

How many adults at this school have close professional relationships with one another?

65% responded favorably

▼ 2 from Spring 2021
- QUESTION

disruptive student behavior?

53% responded favorably

▼ 25 from Spring 2021

Would Our Educational Partners Recommend MPS to Others?

Overall Satisfaction Rate

In addition to the CORE Districts survey questions, MPS also asks our educational partners a single “overall school experience” question to measure their overall satisfaction with the school.

Overall School Experience:

- **Overall, I am satisfied and would recommend this school to other students.**
- **Overall, I am satisfied and would recommend this school to other parents.**
- **Overall, I am satisfied and would recommend this school to other educators.**

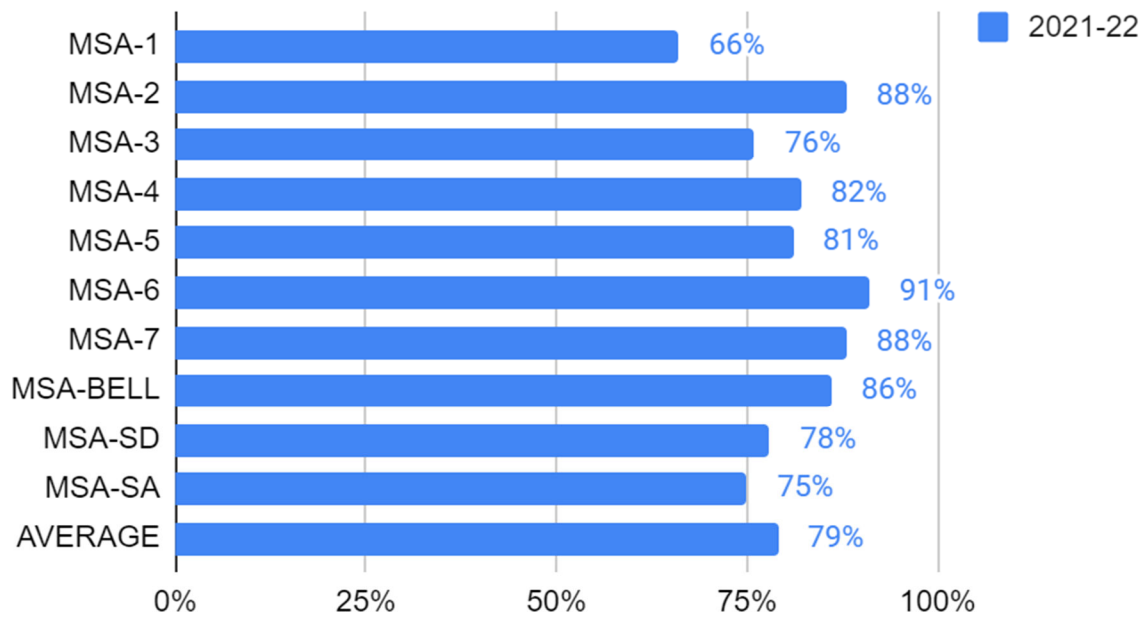
Note: The **overall satisfaction rate** is based on our educational partners’ response to the single question stated above to get a measure of overall satisfaction. This rate is different than the **average approval rates** shown in the above sections. **While the overall satisfaction rate is based on a single question, average approval rates are based on responses to all questions.**

Current Year Overall Satisfaction Rate

In 2021-22, MPS had an average overall satisfaction rate of **79%** for students, **96%** for families, and **90%** for staff. (Last year the average overall satisfaction rates were 86%, 98%, and 94% respectively.)

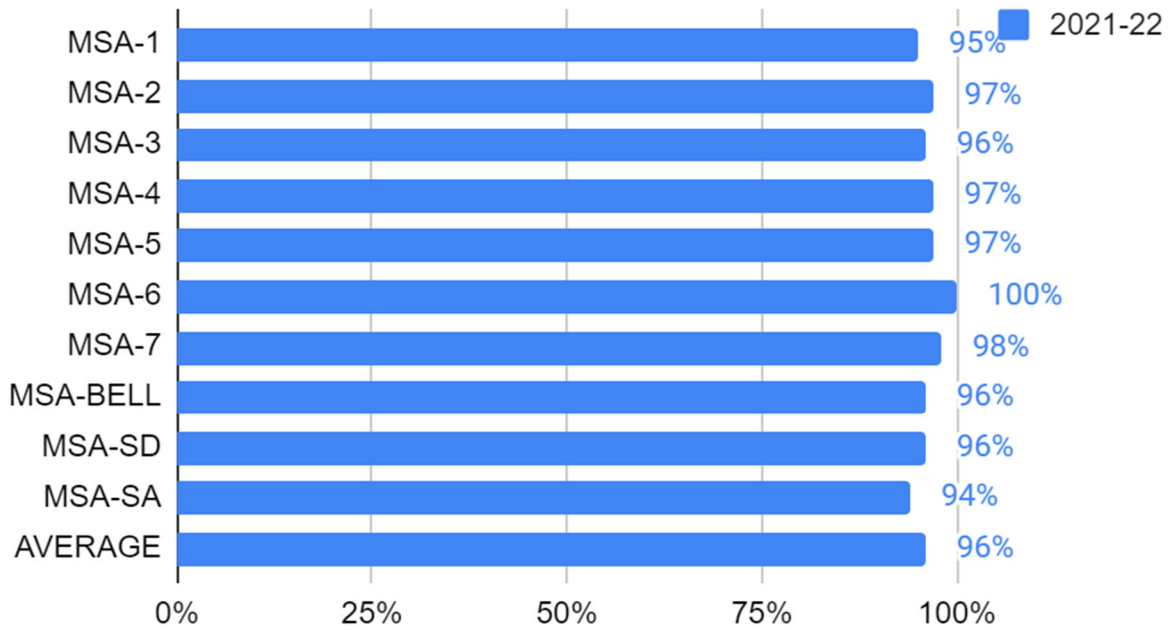
Students

2021-22 MPS Overall Satisfaction Rates - Students



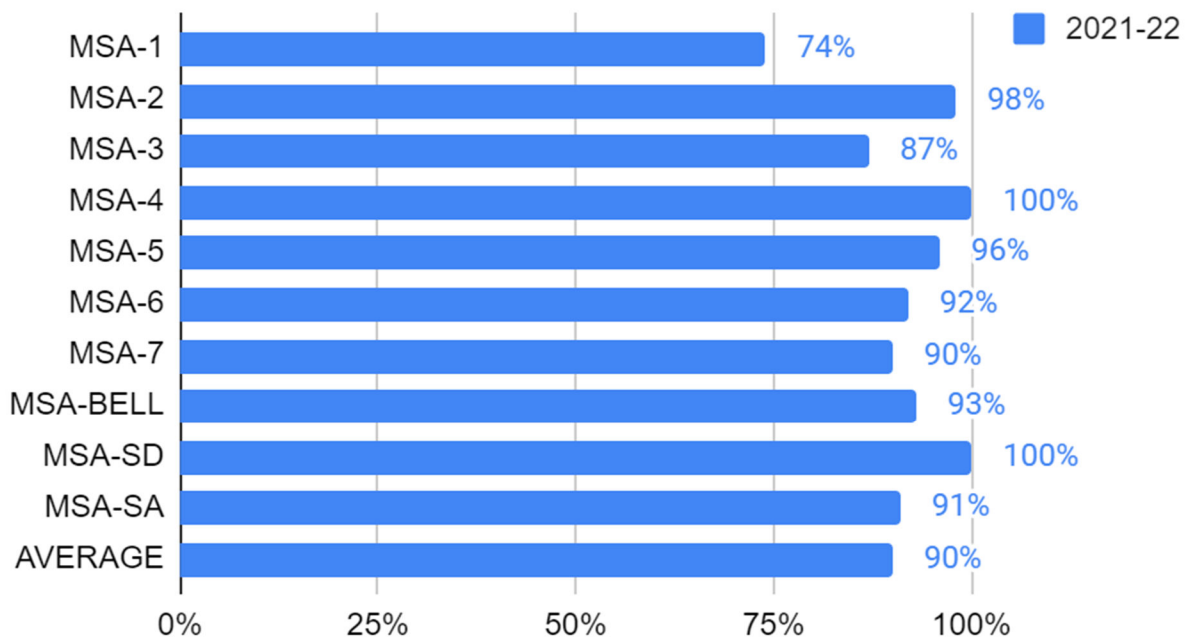
Families

2021-22 MPS Overall Satisfaction Rates - Families



Staff

2021-22 MPS Overall Satisfaction Rates - Staff



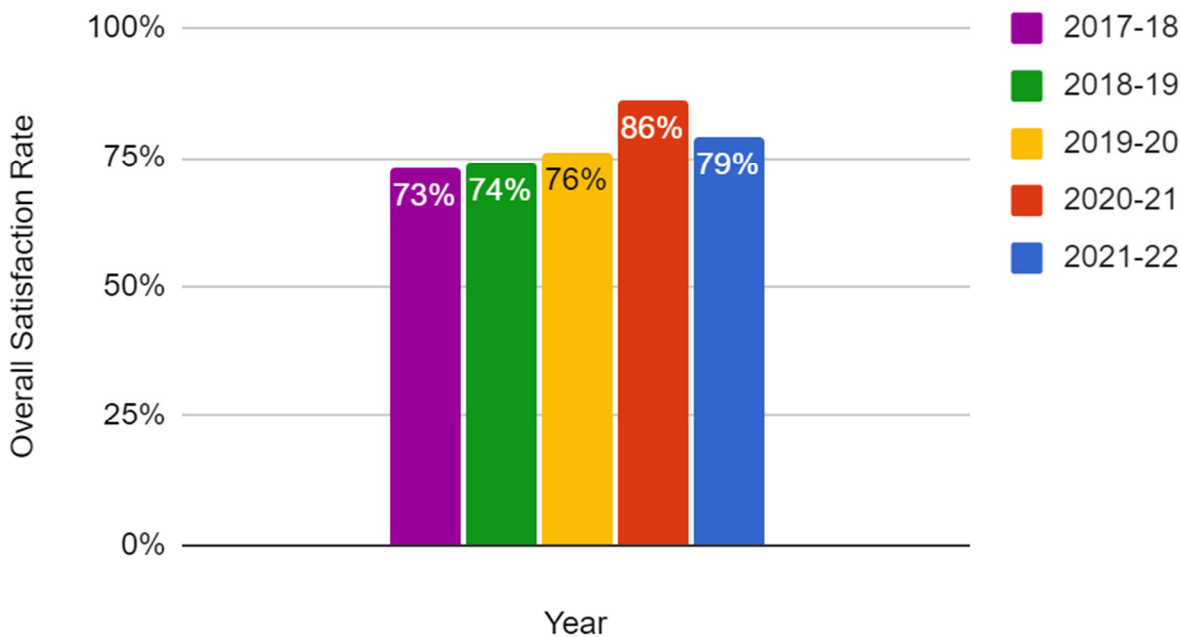
Historical Overall Satisfaction Rates

Considering the last five years, MPS has an upward trend in overall educational partners satisfaction. The following tables and figures show the overall satisfaction rates by students, families, and staff over the years.

Students

MPS Historical Survey Overall Satisfaction Rates - Students					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	72%	75%	73%	84%	66%
MSA-2	72%	75%	83%	88%	88%
MSA-3	66%	65%	55%	77%	76%
MSA-4	78%	64%	73%	91%	82%
MSA-5	78%	87%	77%	90%	81%
MSA-6	77%	78%	82%	90%	91%
MSA-7	86%	89%	89%	87%	88%
MSA-BELL	80%	85%	82%	88%	86%
MSA-SD	76%	64%	80%	89%	78%
MSA-SA	64%	66%	77%	84%	75%
AVERAGE	73%	74%	76%	86%	79%

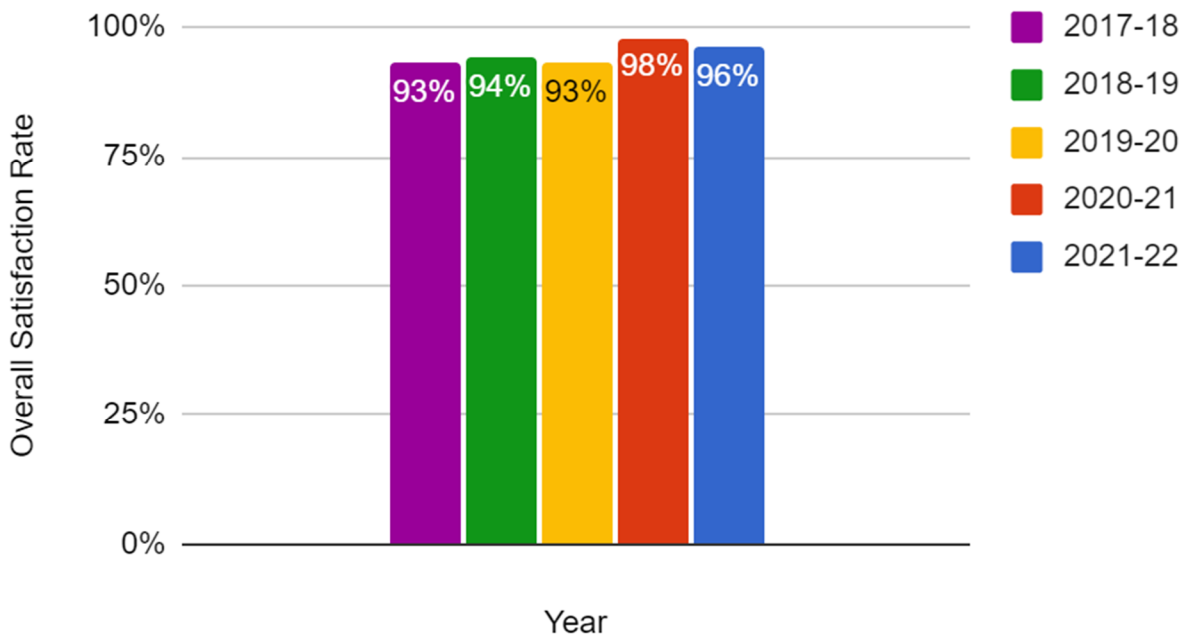
MPS Historical Overall Satisfaction Rates - Students



Families

MPS Historical Survey Overall Satisfaction Rates - Families					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	95%	95%	94%	97%	95%
MSA-2	91%	93%	93%	99%	97%
MSA-3	87%	90%	76%	95%	96%
MSA-4	98%	93%	96%	99%	97%
MSA-5	98%	97%	97%	99%	97%
MSA-6	96%	97%	98%	100%	100%
MSA-7	99%	98%	98%	100%	98%
MSA-BELL	97%	94%	96%	99%	96%
MSA-SD	92%	92%	95%	97%	96%
MSA-SA	89%	90%	94%	98%	94%
AVERAGE	93%	94%	93%	98%	96%

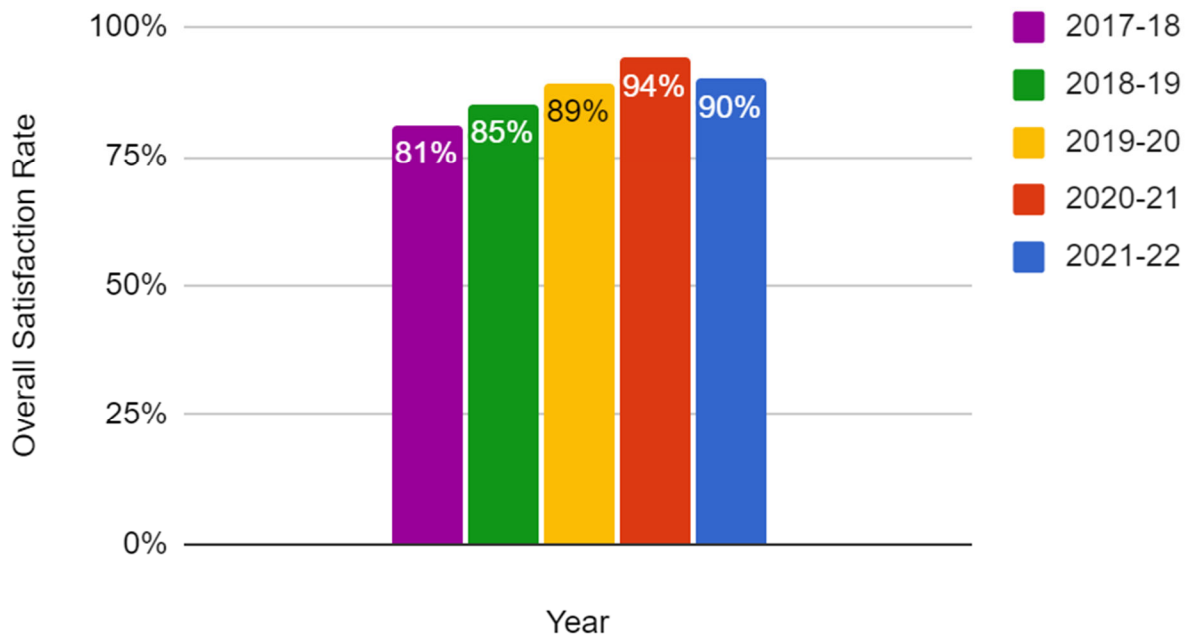
MPS Historical Overall Satisfaction Rates - Families



Staff

MPS Historical Survey Overall Satisfaction Rates - Staff					
	2017-18	2018-19	2019-20	2020-21	2021-22
MSA-1	93%	84%	89%	98%	74%
MSA-2	83%	77%	98%	98%	98%
MSA-3	78%	83%	69%	95%	87%
MSA-4	89%	87%	82%	93%	100%
MSA-5	100%	100%	96%	96%	96%
MSA-6	100%	93%	100%	92%	92%
MSA-7	89%	95%	93%	97%	90%
MSA-BELL	75%	95%	95%	98%	93%
MSA-SD	88%	83%	100%	100%	100%
MSA-SA	51%	75%	84%	78%	91%
AVERAGE	81%	85%	89%	94%	90%

MPS Historical Overall Satisfaction Rates - Staff



What Does MPS Do With Free Response Comments?

Free Response Questions

In addition to the CORE Districts survey questions and the overall satisfaction question, MPS asks all educational partners three open-ended free-response questions:

- 1) WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL?
- 2) WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL?
- 3) WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

Free response questions form a critical component of our survey instrument because it provides a medium for educational partners to give their feedback on any school related issue in a convenient and confidential way. MPS takes open ended responses very seriously and makes sure school leadership teams (SLTs) and the Home Office teams (academics, accountability, HR) read all free responses. After reading responses to free-response questions, the teams summarize major findings and recommendations by the educational partners and consider all the feedback to create action steps for school improvement. The Home Office teams schedule a “survey discussion meeting” with each SLT to review and prioritize the findings with. SLTs are then held accountable for sharing the survey results and findings with their educational partners at their site (teachers, parents, etc.) and developing an action plan for improvement as part of their LCAP process. Please read the next section for details of this process.

Note: Responses to the open-ended questions are not included in this report due to confidentiality.

How Does MPS Make Use of Survey Results?

Reflection and LCAP Development

School leadership teams (SLTs) and the Home Office teams (academics, accountability, HR) review the following data upon conclusion of the survey window:

- Survey participation rates
- Average approval rates
- Overall satisfaction rates
- Average approval rates for each topic
- Average approval rates for each question
- Free response comments
- Feedback collected during the year via other means such as educational partners engagement meetings.

Using the data sources listed above, SLTs and the Home Office follow a protocol to hold a “Survey Discussion Meeting” in order to summarize feedback by each educational partners group (students, families, staff) as bullet points. Typically, this would be 5-7 items for each group that we label as glows (successes), grows (identified needs) and suggestions (next steps). It is important to recognize successes so that school teams continue to maintain or improve them. School teams are encouraged to share and celebrate successes with their educational partners. During our reflection meetings we focus more of our time on identified needs and next steps. Some examples to identified needs could be, “Improve school meal quality” or “Increase support in the classroom to better accommodate the needs of students with disabilities.” SLTs and the Home Office prioritize the identified needs based on the frequency they have been mentioned, importance and impact of the need, and what is in MPS’ circle of control. Some needs can be addressed relatively quickly, such as fixing a broken vending machine, and some require longer term planning (building a gym).

After identified needs are prioritized SLTs and the Home Office discuss possible solutions for the top 5-7 needs and formulate next steps that are realistic (within control and budget). SLTs are then held accountable for the following:

- Writing a reflection on the survey results and findings; the reflection should identify glows, grows, and next steps clearly.
- Sharing the reflection and next steps with school-level educational partners groups and adjusting them as needed;
- Reflecting the actions in next year’s LCAP and budget;
- Sharing the reflection and the next steps at the board level and seeking additional public feedback;
- Implementing and monitoring proposed action steps;
- Updating educational partners on the progress and documenting it in the LCAP annual update.

The process described above is in essence similar to a Plan-Do-Check-Act cycle which repeats itself as the SLTs work toward continuous improvement. Please read the following for details about the survey discussion meeting protocol referenced in this section.

Survey Discussion Meeting Protocol

1. **Scheduling:** J. Lara will schedule a meeting with each school leadership team for 60 minutes.
2. **Participants:** School Leadership Team (SLT), C-team, OC Dept., Academic Dept., HR Dept.
3. **Readiness for the meeting:** School leadership teams read the free responses. Home Office teams read free responses and write highlights for each school in the “Educational Partners Survey Highlights” templates.
 - a. Student survey: Academic team (**J. Hernandez**)
 - b. Family survey: PACE team (**Dr. Lopez**)
 - c. Staff survey: HR team (**D. Hajmeirza**)
4. **Agenda:** (45-60 min)
 - a. **5-7 min** Review purpose of the meeting and survey results (resources to use, participation and approval rates, highest/lowest rated topics and questions, etc.) (**D. Yilmaz/O. Polat**)
 - b. **7 min** Review student survey highlights and ask the school team their thoughts (just preliminary thoughts, no next-step discussion yet) (**J. Hernandez**)
 - c. **7 min** Review family survey highlights and ask the school team their thoughts (just preliminary thoughts, no next-step discussion yet) (**Dr. Lopez**)
 - d. **7 min** Review staff survey highlights and ask the school team their thoughts (just preliminary thoughts, no next-step discussion yet) (**D. Hajmeirza**)
 - e. **7-10 min** In collaboration with the school team, prioritize Glows & Grows from the above reviews in the template. (**A. Rubalcava/E. Acar**)
 - f. **10-15 min** In collaboration with the school team, discuss Next Steps based on Grows and suggestions. (**A. Rubalcava/E. Acar**)
 - g. **5-7 min** Closure
 1. Summarize possible Next Steps; and (**A. Rubalcava/E. Acar**)
 2. Remind SLTs that they need to complete their “Educational Partners Survey Reflections” templates and present their reflection and next steps to the following groups:
 - i. Educational Partners Committee/Board to inform LCAP (**due April 1**)
 - ii. PAC/PTF/SSC/ELAC
 - iii. Staff
 3. Remind SLTs to update their 2022-23 LCAP Educational Partners Engagement section. SLTs will respond to three prompts:

1. Prompt 1: A summary of the educational partners engagement process and how the educational partners engagement was considered before finalizing the LCAP.
 - a. Include **dates** for survey implementation, survey results discussion, reflection and presentation.
2. Prompt 2: A summary of the feedback provided by specific educational partner groups.
 - a. Include highlights (**glows/grows/suggestions**) from each survey separately (student, family, staff).
3. Prompt 3: A description of the aspects of the LCAP that were influenced by specific educational partner input.
 - a. Include **identified needs** you will address in the 2022-23 LCAP based on survey feedback as well as **next action steps**;
 - b. Write how the feedback influenced your LCAP goals, outcomes, actions, and budget.
4. Thank the participants!
5. **Home Office Debrief**: Home Office will internally discuss any follow-ups needed on the school's Next Steps.

Using Student, Parent, and Staff Voices as a Measure of Employee Evaluation

Student, parent, and staff surveys provide valuable feedback to the employee about educational partners' perceptions on employees' effectiveness. MPS makes every effort to reach out to our students, parents, and staff to ensure a high response rate on the surveys. MPS has designed its surveys so that they provide individualized feedback about a variety of topics, as well as educational partners' overall school satisfaction. MPS uses both individualized and general feedback to provide constructive critical feedback to the employees. Employees can use this feedback to improve their effectiveness.

As Core Value Area 9 states, the employee “works positively as part of the organization, follows lines of communication, and understands contribution to total effort; exercises flexibility and willingness to be helpful in making necessary compromises to accomplish a common goal” and “maintains positive relationships and works collaboratively with colleagues, teachers, students, families, and community resources to support the success of the organization.” Collaboration linked to shared goals focused on student achievement leads to higher levels of adult commitment and greater gains in student achievement. MPS values collective commitment and collaboration for shared goals; therefore, MPS will use the average approval rates on the student, parent, and staff surveys as a metric in employee evaluation.

MPS uses the survey average approval rates as a metric that represents educational partners' voices. MPS bases 15 percent of employee's end-of-year overall evaluation on student, parent, and staff surveys. Student, parent, and staff voices will share equal weights of 5 percent. The following table shows how average approval rates are converted to points on the end-of-year overall evaluation. MPS uses both status (percent for current year) and change (percent change from prior year) in determining the final points for student, parent, and staff voices.

AVERAGE APPROVAL RATE		CHANGE (FROM PRIOR YEAR)				
		Declined Significantly by 10% or more	Declined by 5% to less than 10%	Maintained (Declined or improved by less than 5%)	Increased by 5% to less than 10%	Increased Significantly by 10% or more
STATUS (CURRENT YEAR)	Very High 85% or greater	4	4	5	5	5
	High 70% to less than 85%	3	4	4	4	5
	Medium 60% to less than 70%	2	3	3	4	4
	Low 50% to less than 60%	2	2	2	3	3
	Very Low Less than 50%	1	1	1	2	3

Example: A school with parent average approval rate of 75% in the current year and 63% in the prior year would earn its employees 5 points for parent voice on the end-of-year overall employee evaluation. Similarly, the same school with student average approval rates of 68% in the current year and 60% in the prior year would earn its employees 4 points for student voice. If staff average approval rate increased from 80% to 83% from the prior year, it would correspond to 4 points for staff voice. A total of 13 points (out of 15) would be used as the overall score for Student, Parent, and Staff Voices. *(For Home Office employees, overall MPS average approval rates are used.)*

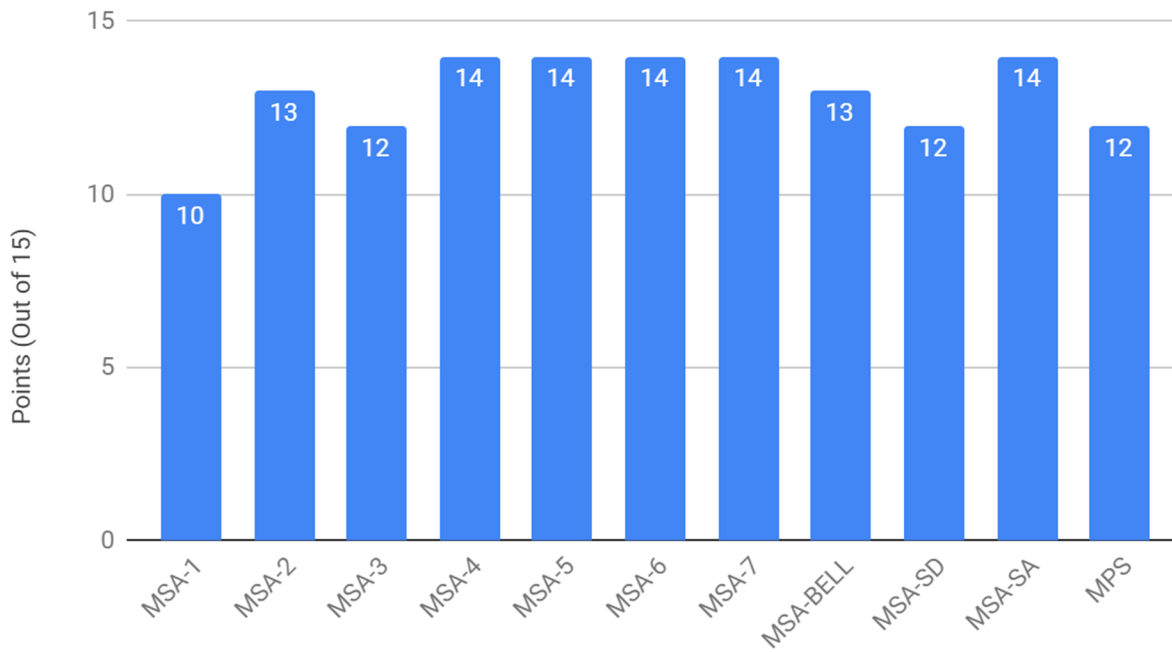
Employees are expected to check their school's targets for student, parent, and staff average approval rates in their Local Control and Accountability Plans (LCAP).

School Evaluation Scores for the Current Year

MPS has calculated the survey portion of employee evaluations using the methodology as described in the policy above. The following are the evaluation scores for each MPS in 2021-22. **(Total points are out of 15.)**

AVERAGE APPROVAL Rates: 2021-22 vs. 2020-21													
	Student				Family				Staff				TOTAL
	2020-21	2021-22	Change	Points	2020-21	2021-22	Change	Points	2020-21	2021-22	Change	Points	
MSA-1	72%	58%	-14%	2	95%	91%	-4%	5	92%	73%	-19%	3	10
MSA-2	76%	73%	-3%	4	98%	97%	-1%	5	94%	85%	-9%	4	13
MSA-3	67%	64%	-3%	3	95%	96%	1%	5	85%	80%	-5%	4	12
MSA-4	79%	74%	-5%	4	98%	98%	0%	5	92%	89%	-3%	5	14
MSA-5	76%	70%	-6%	4	97%	96%	-1%	5	93%	92%	-1%	5	14
MSA-6	79%	77%	-2%	4	99%	99%	0%	5	93%	97%	4%	5	14
MSA-7	81%	77%	-4%	4	99%	98%	-1%	5	97%	93%	-4%	5	14
MSA-BELL	79%	72%	-7%	4	97%	96%	-1%	5	92%	84%	-8%	4	13
MSA-SD	76%	66%	-10%	2	97%	96%	-1%	5	95%	92%	-3%	5	12
MSA-SA	76%	70%	-6%	4	96%	94%	-2%	5	84%	88%	4%	5	14
MPS	75%	68%	-7%	3	97%	96%	-1%	5	91%	85%	-6%	4	12

2021-22 Evaluation Points Based on the Educational Partners Survey Results



Exhibits (Attachments)

- Panorama 2021-22 MPS Average Approval Rates by Question (*Student, Family, Staff*)
- Panorama 2021-22 MPS Detailed Survey Reports (*Student, Family, Staff*)
- MPS 2021-22 Educational Partners Survey Reflections (*one from each school*)

< Summary



Spring 2022
Secondary Student Survey

All questions

Based on 2,918 responses

How did students respond to each question?

Sorted by Question score ▾ Highest to lowest ▾

QUESTION ➤ Teachers give students a chance to take part in classroom discussions or activities.	83% responded favorably	
QUESTION ➤ Been afraid of being beaten up?	82% responded favorably	
QUESTION ➤ This school clearly informs students what would happen if they break school rules.	79% responded favorably	
QUESTION ➤ My teachers work hard to help me with my schoolwork when I need it.	79% responded favorably	
QUESTION ➤ Overall, I am satisfied and would recommend this school to other students.	78% responded favorably	
QUESTION ➤ Had your property stolen, or deliberately damaged, such as your car, clothing, or books?	77% responded favorably	
QUESTION ➤ This school makes it clear how students are expected to act.	75% responded favorably	
QUESTION		

Need Help?

➤ Adults at this school encourage me to work hard so I can be successful in college or at the job I choose. **75%** responded favorably

QUESTION
➤ This school promotes academic success for all students. **74%** responded favorably

QUESTION
➤ Had sexual jokes, comments, or gestures made to you? **73%** responded favorably

QUESTION
➤ Rules in this school are made clear to students. **73%** responded favorably

QUESTION
➤ Students know what the rules are. **71%** responded favorably

QUESTION
➤ This school is a supportive and inviting place for students to learn. **71%** responded favorably

QUESTION
➤ Teachers go out of their way to help students. **70%** responded favorably











QUESTION
➤ Students know how they are expected to act. **68%** responded favorably

QUESTION
➤ Had mean rumors or lies spread about you? **66%** responded favorably

QUESTION
➤ Been pushed, shoved, slapped, hit or kicked by someone who wasn't just kidding around? **66%** responded favorably

QUESTION
➤ Been made fun of because of your looks or the way you talk? **64%** responded favorably

Need Help?

QUESTION ➤ Adults at this school treat all students with respect.	63% responded favorably	
QUESTION ➤ I feel close to people at this school.	63% responded favorably	
QUESTION ➤ How safe do you feel when you are at school?	62% responded favorably	
QUESTION ➤ The teachers at this school treat students fairly.	60% responded favorably	
QUESTION ➤ I feel safe in my school.	58% responded favorably	
QUESTION ➤ I am happy to be at this school.	55% responded favorably	
QUESTION ➤ The school rules are fair.	54% responded favorably	
QUESTION ➤ All students are treated fairly when they break school rules.	52% responded favorably	
QUESTION ➤ I feel like I am part of this school.	52% responded favorably	
QUESTION ➤ Students treat teachers with respect.	39% responded favorably	

Need Help?



Need Help?

< Summary



Spring 2022
Elementary Student Survey

All questions

Based on 252 responses

How did students respond to each question?

Sorted by Question score ▾ Highest to lowest ▾

QUESTION ➤ Does this school help all students be successful in school?	92% responded favorably	
QUESTION ➤ Do teachers and other grown-ups at school treat students with respect?	90% responded favorably	
QUESTION ➤ Are the school rules fair?	89% responded favorably	
QUESTION ➤ Overall, I am satisfied and would recommend this school to other students.	88% responded favorably	
QUESTION ➤ Do teachers treat students fairly at school?	88% responded favorably	
QUESTION ➤ Does this school clearly tell students what would happen if they break school rules?	86% responded favorably	
QUESTION ➤ Do students know what the rules are?	84% responded favorably	
QUESTION		

Need Help?

➤ Are rules in this school made clear to students? **84%** responded favorably

QUESTION
➤ Do teachers go out of their way to help students? **83%** responded favorably

QUESTION
➤ Do your teachers work hard to help you with your schoolwork when you need it? **82%** responded favorably

QUESTION
➤ Are you happy to be at this school? **81%** responded favorably

QUESTION
➤ Do you feel like you are part of this school? **81%** responded favorably

QUESTION
➤ Do other kids at this school ever tease you about the way you talk? **81%** responded favorably

QUESTION
➤ Do you feel safe at school? **80%** responded favorably








QUESTION
➤ Do teachers give students a chance to take part in classroom discussions or activities? **78%** responded favorably

QUESTION
➤ Do students treat teachers with respect? **76%** responded favorably

QUESTION
➤ Do other kids at this school ever tease you about what your body looks like? **75%** responded favorably

QUESTION
➤ Do other kids steal or damage your things, like your clothing or your books? **75%** responded favorably

Need Help?

QUESTION Do adults at school encourage you to work hard so you can be successful?	73% responded favorably	
QUESTION Do students know how they are expected to act?	71% responded favorably	
QUESTION Are students treated fairly when they break school rules?	68% responded favorably	
QUESTION Do you feel close to people at school?	64% responded favorably	
QUESTION Do other kids at school spread mean rumors or lies about you?	63% responded favorably	
QUESTION Do other kids hit or push you at school when they are not just playing around?	61% responded favorably	
QUESTION Are you afraid of being beaten up at school?	58% responded favorably	

Powered by



Need Help?

< Summary



Spring 2022
Family Survey

All questions

Based on 1,934 responses







How did family members respond to each question?

Sorted by Question score ▾ Highest to lowest ▾

QUESTION I am a...	Unscored	
QUESTION English Language Development (for children learning English)?	Unscored	
QUESTION Special Education Program or has an Individual Education Plan (IEP)?	Unscored	
QUESTION In what grade is your child?	Unscored	
QUESTION What is your race or ethnicity?	Unscored	
QUESTION Does one or more of your children receive a free or reduced-price breakfast or lunch at this school?	Unscored	
QUESTION How many years has your child been at this school?	Unscored	
QUESTION		

➤	School staff is helpful.	98% responded favorably	0 from Spring 2021	
QUESTION	➤ School staff treats me with respect.	98% responded favorably	0 from Spring 2021	
QUESTION	➤ This school provides high quality instruction to my child.	98% responded favorably	▲ 1 from Spring 2021	
QUESTION	➤ My child's background (race, ethnicity, religion, economic status) is valued at this school.	97% responded favorably	▼ 1 from Spring 2021	
QUESTION	➤ This school has high expectations for all students.	97% responded favorably	0 from Spring 2021	
QUESTION	➤ This school clearly informs students what would happen if they break school rules.	96% responded favorably	▼ 2 from Spring 2021	
QUESTION	➤ I feel welcome to participate at this school.	96% responded favorably	▼ 2 from Spring 2021	
QUESTION	➤ Overall, I am satisfied and would recommend this school to other parents.	96% responded favorably	▼ 2 from Spring 2021	
QUESTION	➤ My child is safe on school grounds.	95% responded favorably	▼ 1 from Spring 2021	
QUESTION	➤ School staff responds to my needs in a timely manner.	95% responded favorably	▼ 1 from Spring 2021	
QUESTION	➤ School staff takes my concerns seriously.	95% responded favorably	▼ 1 from Spring 2021	

Need Help?

<p>QUESTION</p> <p>➤ School staff welcomes my suggestions.</p>	<p>95% </p> <p>responded favorably</p>	<p>▼ 2</p> <p>from Spring 2021</p>	
<p>QUESTION</p> <p>➤ At this school, discipline is fair.</p>	<p>93% </p> <p>responded favorably</p>	<p>▼ 2</p> <p>from Spring 2021</p>	
<p>QUESTION</p> <p>➤ My child is safe in the neighborhood around the school.</p>	<p>91% </p> <p>responded favorably</p>	<p>0</p> <p>from Spring 2021</p>	

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Need Help?

< Summary



Spring 2022
Staff Survey

All questions

Based on 356 responses

How did teachers & staff respond to each question?

Sorted by Question score ▾ Highest to lowest ▾

QUESTION ➤ Are you a classroom teacher?	Unscored	
QUESTION ➤ What is your role at this school? (Mark all that apply).	Unscored	
QUESTION ➤ Migrant education students	Unscored	
QUESTION ➤ Special education students	Unscored	
QUESTION ➤ English language learners	Unscored	
QUESTION ➤ How many years have you worked, in any position, at this school?	Unscored	
QUESTION ➤ How many years have you worked at any school in your current position (e.g., teacher, counselor, administrator, food service)?	Unscored	
QUESTION	Unscored	

Need Help?

>	What is your race or ethnicity?			
>	QUESTION emphasizes helping students academically when they need it.	99% responded favorably	0 from Spring 2021	
>	QUESTION The school rules are fair.	97% responded favorably	▼ 2 from Spring 2021	
>	QUESTION is a supportive and inviting place for students to learn.	97% responded favorably	▼ 1 from Spring 2021	
>	QUESTION promotes academic success for all students.	96% responded favorably	0 from Spring 2021	
>	QUESTION encourages students to enroll in rigorous courses (such as honors and AP), regardless of their race, ethnicity, or nationality.	95% responded favorably	0 from Spring 2021	
>	QUESTION Adults at this school treat all students with respect.	94% responded favorably	▼ 4 from Spring 2021	
>	QUESTION emphasizes teaching lessons in ways relevant to students.	94% responded favorably	▼ 3 from Spring 2021	
>	QUESTION racial/ethnic conflict among students?	92% responded favorably	▼ 5 from Spring 2021	
>	QUESTION This school promotes trust and collegiality among staff.	91% responded favorably	▼ 3 from Spring 2021	
>	QUESTION This school is a supportive and inviting place for staff to work.	91% responded favorably	▼ 2 from Spring 2021	

Need Help?

QUESTION	90%	▼ 5	
> physical fighting between students?	responded favorably	from Spring 2021	
QUESTION	90%	0	
> How many adults at this school support and treat each other with respect?	responded favorably	from Spring 2021	
QUESTION	90%	▼ 4	
> Overall, I am satisfied and would recommend this school to other educators.	responded favorably	from Spring 2021	
QUESTION	89%	▼ 1	
> sets high standards for academic performance for all students.	responded favorably	from Spring 2021	
QUESTION	86%	▼ 9	
> This school makes it clear how students are expected to act.	responded favorably	from Spring 2021	
QUESTION	86%	▼ 11	
> Students know how they are expected to act.	responded favorably	from Spring 2021	
QUESTION	85%	▼ 9	
> Students know what the rules are.	responded favorably	from Spring 2021	
QUESTION	85%	▼ 7	
> Rules in this school are made clear to students.	responded favorably	from Spring 2021	
QUESTION	84%	▼ 6	
> This school handles discipline problems fairly.	responded favorably	from Spring 2021	
QUESTION	83%	▼ 3	
> This school promotes personnel participation in decision-making that affects school practices and policies.	responded favorably	from Spring 2021	
QUESTION	79%	▼ 6	
> This school clearly communicates to students the consequences of breaking school rules.	responded favorably	from Spring 2021	

Need Help?

QUESTION				
>	How many adults at this school feel a responsibility to improve this school?	76% responded favorably	▼ 5 from Spring 2021	
QUESTION				
>	harassment or bullying among students?	75% responded favorably	▼ 13 from Spring 2021	
QUESTION				
>	This school effectively handles student discipline and behavioral problems.	72% responded favorably	▼ 13 from Spring 2021	
QUESTION				
>	lack of respect of staff by students?	70% responded favorably	▼ 17 from Spring 2021	
QUESTION				
>	How many adults at this school have close professional relationships with one another?	65% responded favorably	▼ 2 from Spring 2021	
QUESTION				
>	disruptive student behavior?	53% responded favorably	▼ 25 from Spring 2021	

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Need Help?



MPS

Secondary Student Survey Spring 2022



Report created by
Panorama Education



Summary

Topic Description	Results	Benchmark
Climate of Support for Academic Learning	75%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
Knowledge and Fairness of Discipline, Rules and Norms	64%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
OVERALL SCHOOL EXPERIENCE	78%	
Safety	69%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
Sense of Belonging (School Connectedness)	58%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>

2,918 responses



Climate of Support for Academic Learning

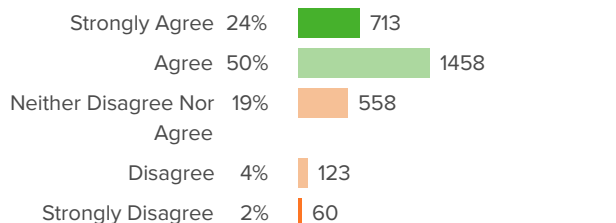
Your average

75%

2,918 responses

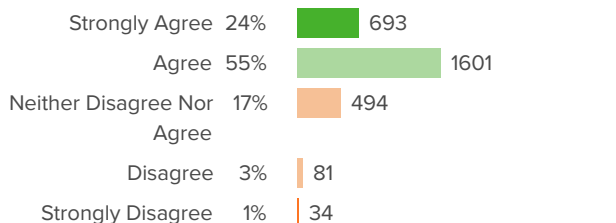
How did people respond?

Q.1: Adults at this school encourage me to work hard so I can be successful in college or at the job I choose.



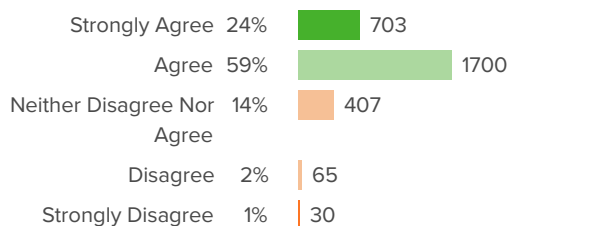
Favorable: **75%**

Q.2: My teachers work hard to help me with my schoolwork when I need it.



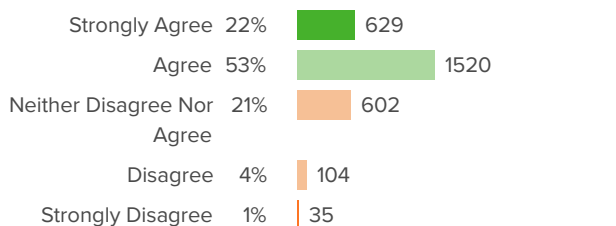
Favorable: **79%**

Q.3: Teachers give students a chance to take part in classroom discussions or activities.



Favorable: **83%**

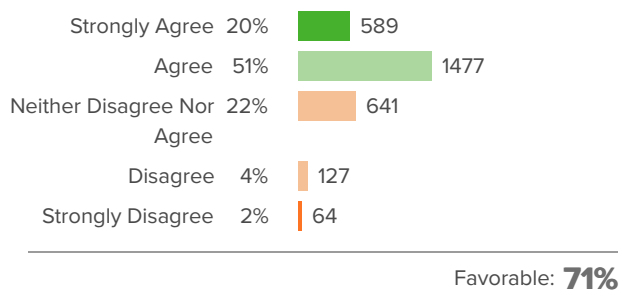
Q.4: This school promotes academic success for all students.



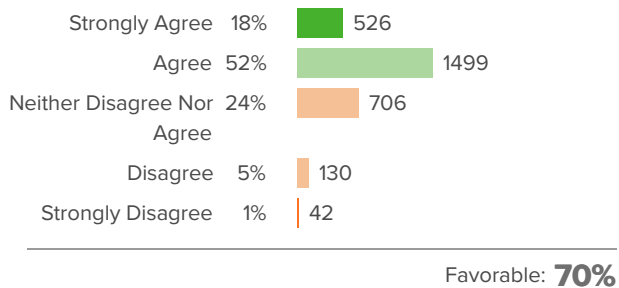
Favorable: **74%**



Q.5: This school is a supportive and inviting place for students to learn.



Q.6: Teachers go out of their way to help students.





Knowledge and Fairness of Discipline, Rules and Norms

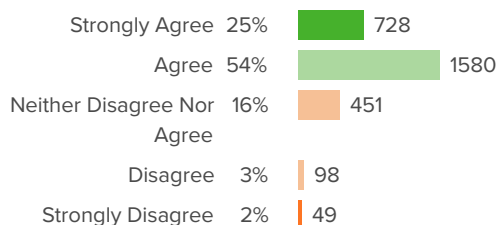
Your average

64%

2,918 responses

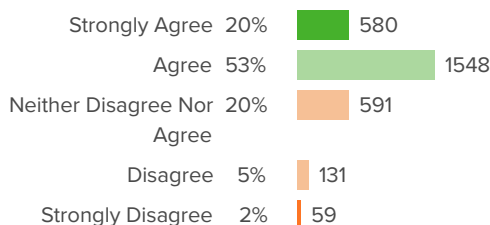
How did people respond?

Q.1: This school clearly informs students what would happen if they break school rules.



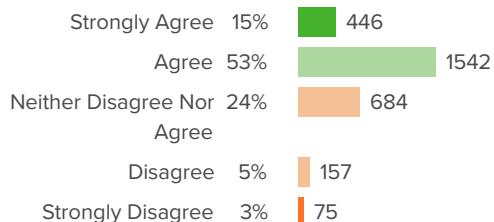
Favorable: **79%**

Q.2: Rules in this school are made clear to students.



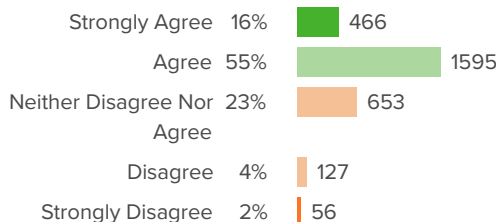
Favorable: **73%**

Q.3: Students know how they are expected to act.



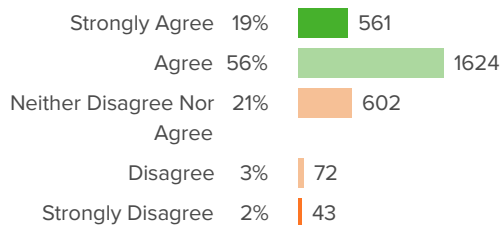
Favorable: **68%**

Q.4: Students know what the rules are.



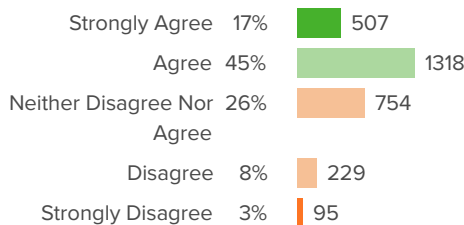
Favorable: **71%**

Q.5: This school makes it clear how students are expected to act.



Favorable: **75%**

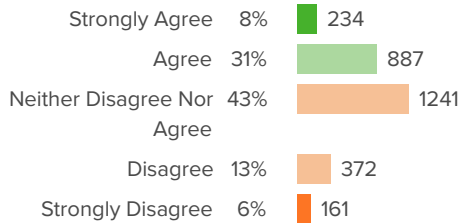
Q.6: Adults at this school treat all students with respect.



Favorable: **63%**

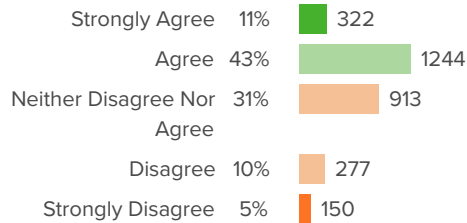


Q.7: Students treat teachers with respect.



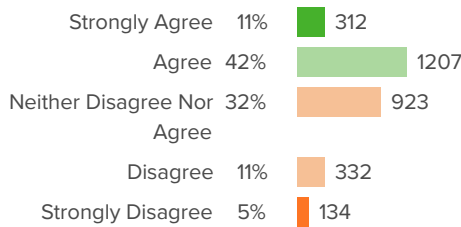
Favorable: **39%**

Q.8: The school rules are fair.



Favorable: **54%**

Q.9: All students are treated fairly when they break school rules.



Favorable: **52%**



OVERALL SCHOOL EXPERIENCE

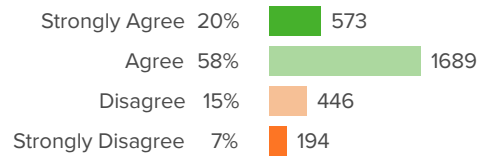
Your average

78%

2,918 responses

How did people respond?

Q.1: Overall, I am satisfied and would recommend this school to other students.



Favorable: **78%**



Safety

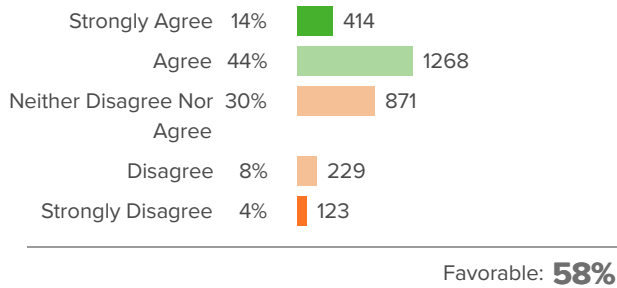
Your average

69%

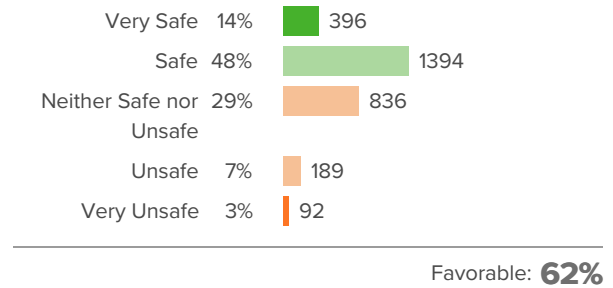
2,918 responses

How did people respond?

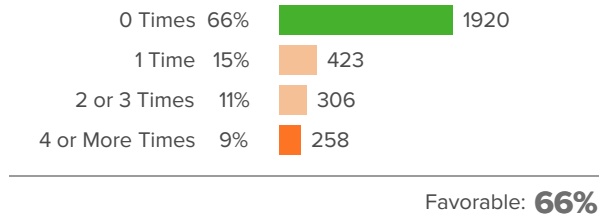
Q.1: I feel safe in my school.



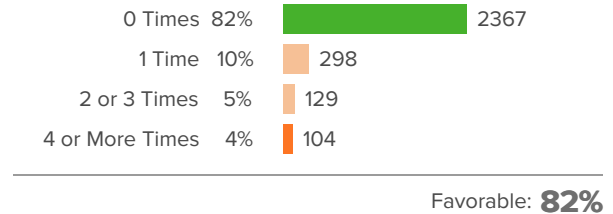
Q.2: How safe do you feel when you are at school?



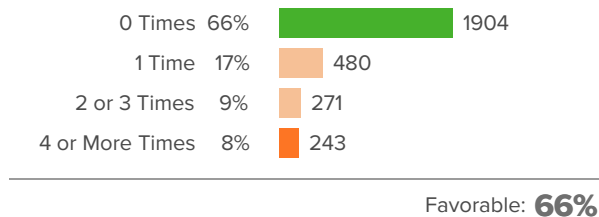
Q.3: Been pushed, shoved, slapped, hit or kicked by someone who wasn't just kidding around?



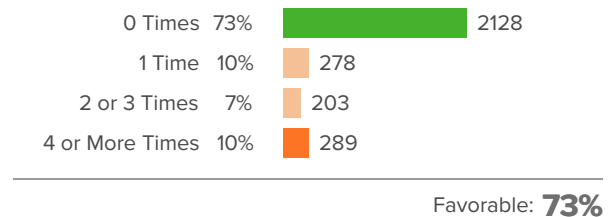
Q.4: Been afraid of being beaten up?



Q.5: Had mean rumors or lies spread about you?

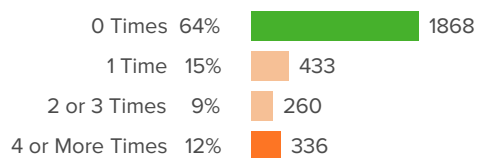


Q.6: Had sexual jokes, comments, or gestures made to you?



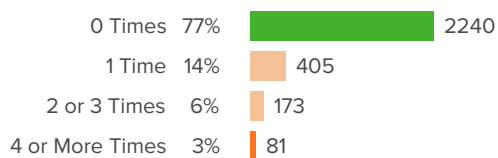


Q.7: Been made fun of because of your looks or the way you talk?



Favorable: **64%**

Q.8: Had your property stolen, or deliberately damaged, such as your car, clothing, or books?



Favorable: **77%**



Sense of Belonging (School Connectedness)

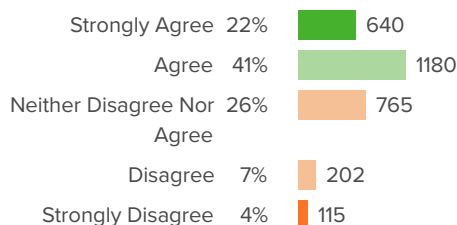
Your average

58%

2,918 responses

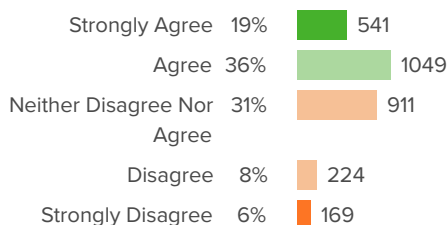
How did people respond?

Q.1: I feel close to people at this school.



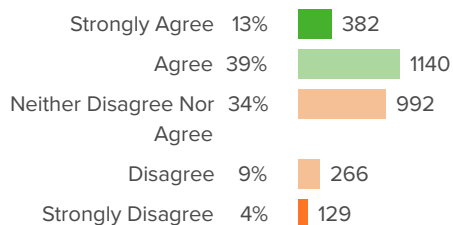
Favorable: **63%**

Q.2: I am happy to be at this school.



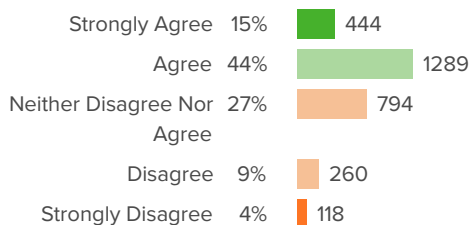
Favorable: **55%**

Q.3: I feel like I am part of this school.



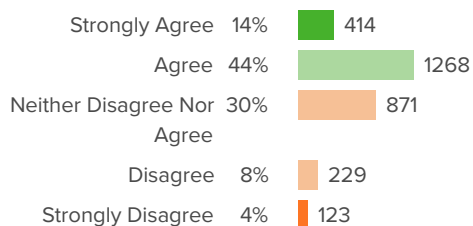
Favorable: **52%**

Q.4: The teachers at this school treat students fairly.



Favorable: **60%**

Q.5: I feel safe in my school.



Favorable: **58%**



MPS

Elementary Student Survey Spring 2022



Report created by
Panorama Education



Summary

Topic Description	Results	Benchmark
Climate of Support for Academic Learning	82%	<p>20th - 39th percentile compared to others in the CORE Districts dataset</p>
Knowledge and Fairness of Discipline, Rules and Norms	81%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
OVERALL SCHOOL EXPERIENCE	88%	
Safety	70%	<p>80th - 99th percentile compared to others in the CORE Districts dataset</p>
Sense of Belonging (School Connectedness)	79%	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>

252 responses



Climate of Support for Academic Learning

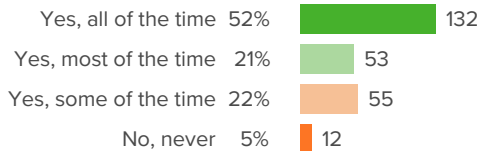
Your average

82%

252 responses

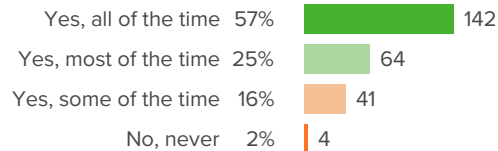
How did people respond?

Q.1: Do adults at school encourage you to work hard so you can be successful?



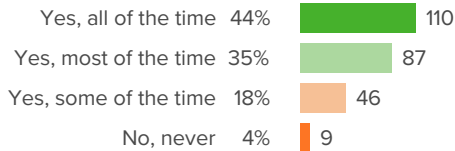
Favorable: **73%**

Q.2: Do your teachers work hard to help you with your schoolwork when you need it?



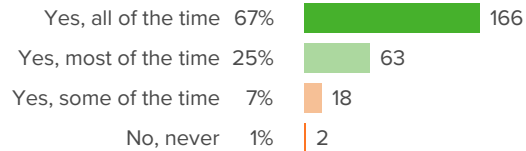
Favorable: **82%**

Q.3: Do teachers give students a chance to take part in classroom discussions or activities?



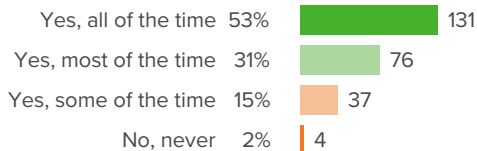
Favorable: **78%**

Q.4: Does this school help all students be successful in school?



Favorable: **92%**

Q.5: Do teachers go out of their way to help students?



Favorable: **83%**



Knowledge and Fairness of Discipline, Rules and Norms

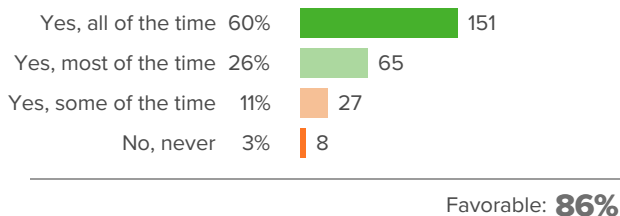
Your average

81%

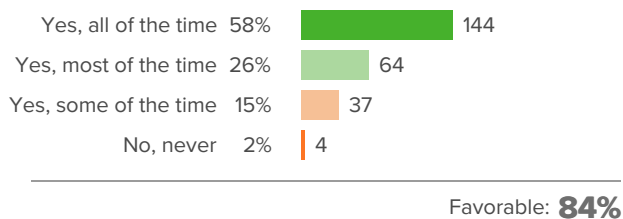
252 responses

How did people respond?

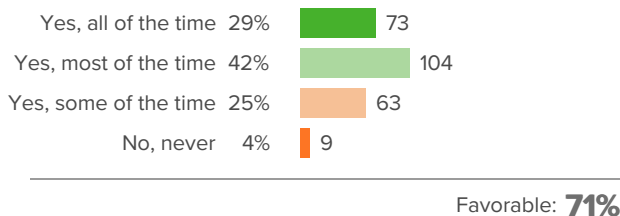
Q.1: Does this school clearly tell students what would happen if they break school rules?



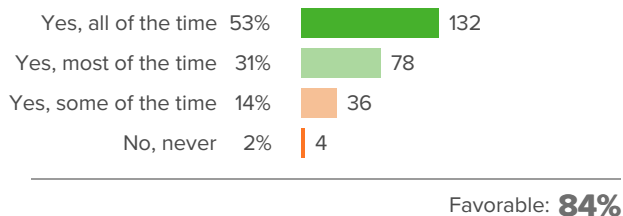
Q.2: Are rules in this school made clear to students?



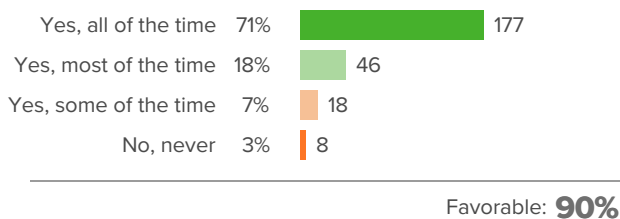
Q.3: Do students know how they are expected to act?



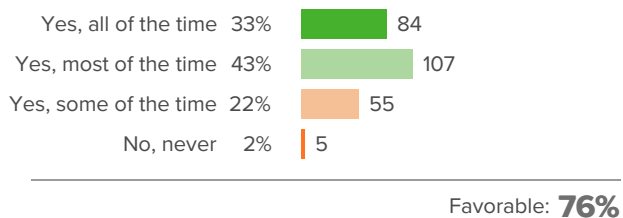
Q.4: Do students know what the rules are?



Q.5: Do teachers and other grown-ups at school treat students with respect?

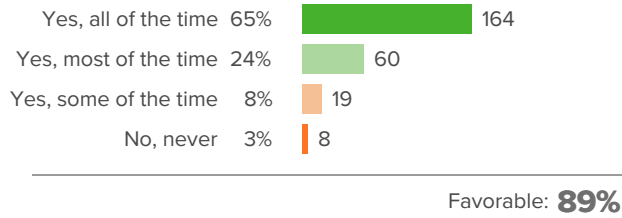


Q.6: Do students treat teachers with respect?

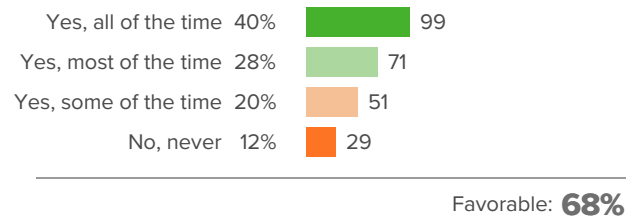




Q.7: Are the school rules fair?



Q.8: Are students treated fairly when they break school rules?





OVERALL SCHOOL EXPERIENCE

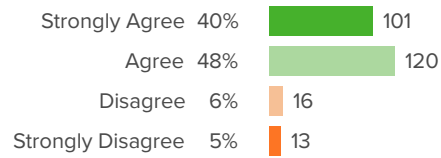
Your average

88%

252 responses

How did people respond?

Q.1: Overall, I am satisfied and would recommend this school to other students.



Favorable: **88%**



Safety

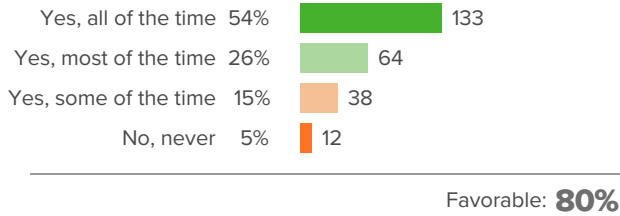
Your average

70%

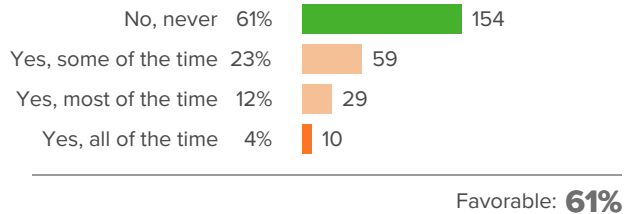
252 responses

How did people respond?

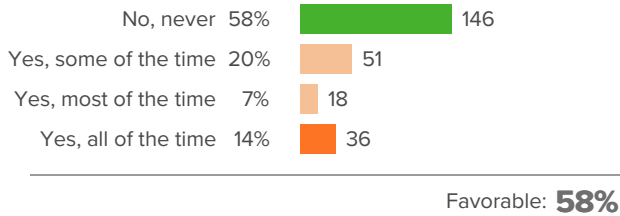
Q.1: Do you feel safe at school?



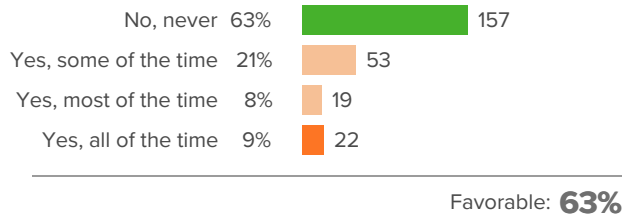
Q.2: Do other kids hit or push you at school when they are not just playing around?



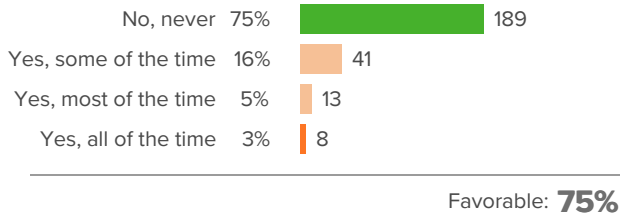
Q.3: Are you afraid of being beaten up at school?



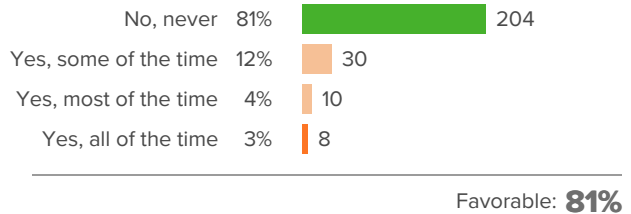
Q.4: Do other kids at school spread mean rumors or lies about you?



Q.5: Do other kids at this school ever tease you about what your body looks like?

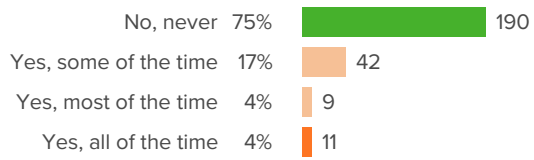


Q.6: Do other kids at this school ever tease you about the way you talk?





Q.7: Do other kids steal or damage your things, like your clothing or your books?



Favorable: **75%**



Sense of Belonging (School Connectedness)

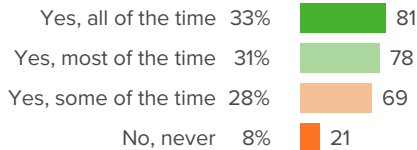
Your average

79%

252 responses

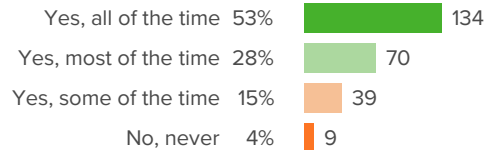
How did people respond?

Q.1: Do you feel close to people at school?



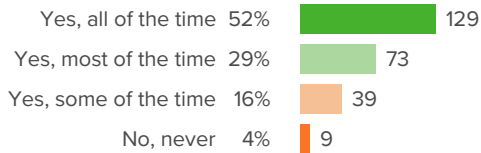
Favorable: **64%**

Q.2: Are you happy to be at this school?



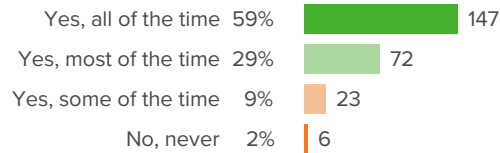
Favorable: **81%**

Q.3: Do you feel like you are part of this school?



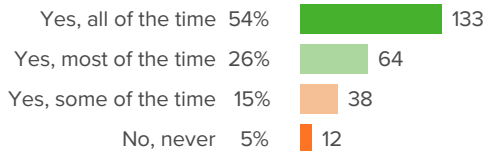
Favorable: **81%**

Q.4: Do teachers treat students fairly at school?



Favorable: **88%**

Q.5: Do you feel safe at school?



Favorable: **80%**



MPS

Family Survey
Spring 2022



Report created by
Panorama Education



Summary

Topic Description	Results	Benchmark
Climate of Support for Academic Learning	<p>98%</p> <p>▲1 since last survey</p>	<p>80th - 99th percentile compared to others in the CORE Districts dataset</p>
Knowledge and Fairness of Discipline, Rules and Norms	<p>95%</p> <p>▼2 since last survey</p>	<p>60th - 79th percentile compared to others in the CORE Districts dataset</p>
OVERALL SCHOOL EXPERIENCE	<p>96%</p> <p>▼2 since last survey</p>	
Safety	<p>93%</p> <p>▼1 since last survey</p>	<p>60th - 79th percentile compared to others in the CORE Districts dataset</p>
Sense of Belonging (School Connectedness)	<p>96%</p> <p>▼1 since last survey</p>	<p>80th - 99th percentile compared to others in the CORE Districts dataset</p>

1,934 responses



Climate of Support for Academic Learning

Your average

98%

1,934 responses

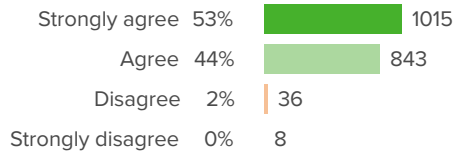
Change

▲ 1

since last survey

How did people respond?

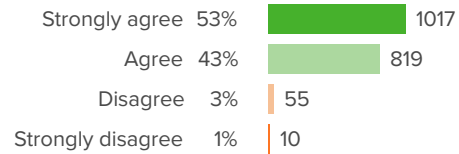
Q.1: This school provides high quality instruction to my child.



▲ **1** from last survey

Favorable: **98%**

Q.2: This school has high expectations for all students.



▲ **0** from last survey

Favorable: **97%**



Knowledge and Fairness of Discipline, Rules and Norms

Your average

95%

1,934 responses

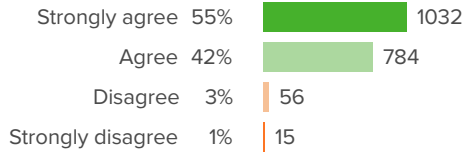
Change

▼ **2**

since last survey

How did people respond?

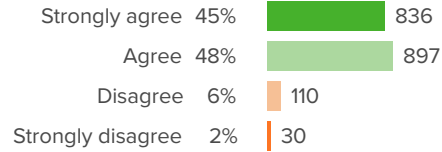
Q.1: This school clearly informs students what would happen if they break school rules.



▼ **2** from last survey

Favorable: **96%**

Q.2: At this school, discipline is fair.



▼ **2** from last survey

Favorable: **93%**



OVERALL SCHOOL EXPERIENCE

Your average

96%

1,934 responses

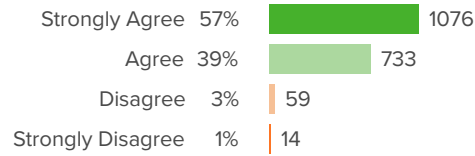
Change

▼ **2**

since last survey

How did people respond?

Q.1: Overall, I am satisfied and would recommend this school to other parents.



▼ **2** from last survey

Favorable: **96%**



Safety

Your average

93%

1,934 responses

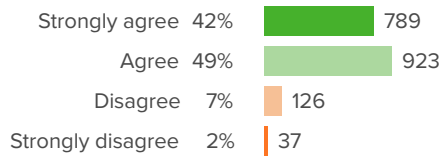
Change

▼ **1**

since last survey

How did people respond?

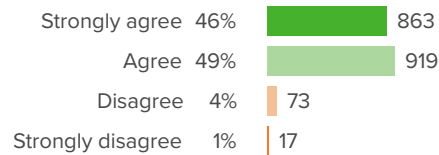
Q.1: My child is safe in the neighborhood around the school.



▲ **0** from last survey

Favorable: **91%**

Q.2: My child is safe on school grounds.



▼ **1** from last survey

Favorable: **95%**



Sense of Belonging (School Connectedness)

Your average

96%

1,934 responses

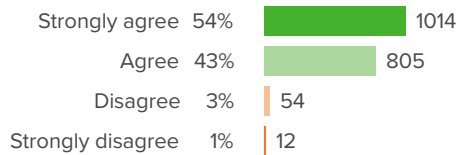
Change

▼ 1

since last survey

How did people respond?

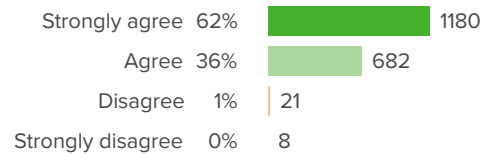
Q.1: I feel welcome to participate at this school.



▼ 2 from last survey

Favorable: **96%**

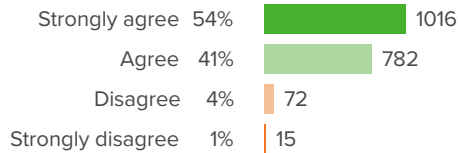
Q.2: School staff treats me with respect.



▲ 0 from last survey

Favorable: **98%**

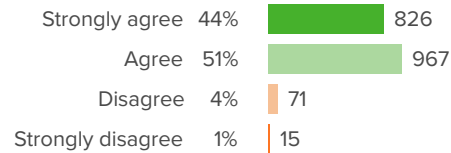
Q.3: School staff takes my concerns seriously.



▼ 1 from last survey

Favorable: **95%**

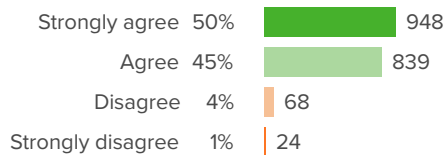
Q.4: School staff welcomes my suggestions.



▼ 2 from last survey

Favorable: **95%**

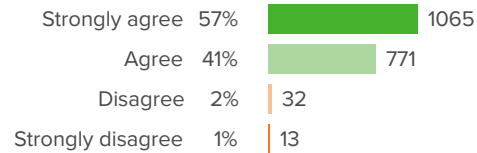
Q.5: School staff responds to my needs in a timely manner.



▼ 1 from last survey

Favorable: **95%**

Q.6: School staff is helpful.

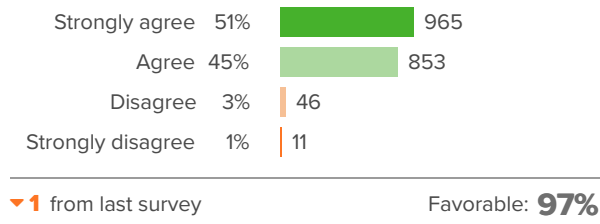


▲ 0 from last survey

Favorable: **98%**



Q.7: My child's background (race, ethnicity, religion, economic status) is valued at this school.

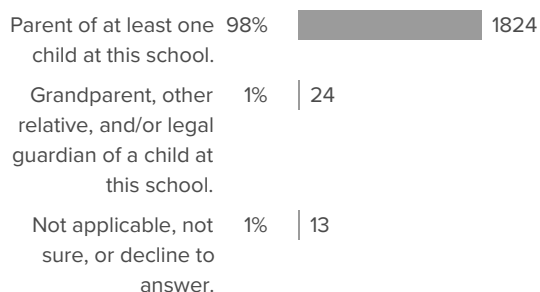




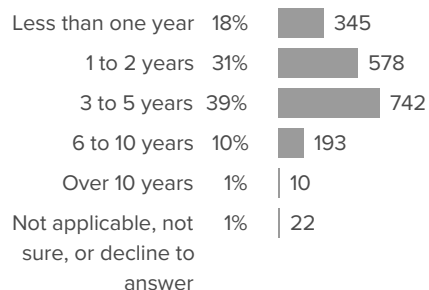
Background Questions

How did people respond?

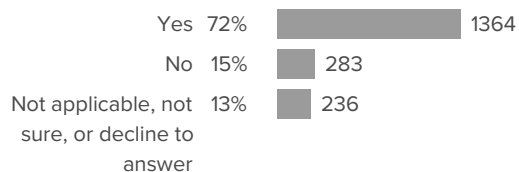
Q.1: I am a...



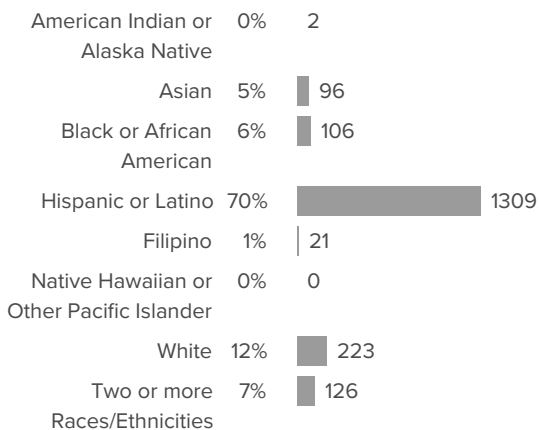
Q.2: How many years has your child been at this school?



Q.3: Does one or more of your children receive a free or reduced-price breakfast or lunch at this school?

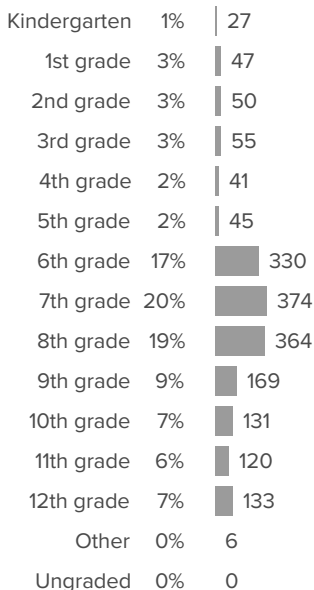


Q.4: What is your race or ethnicity?

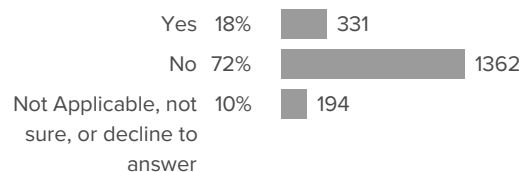




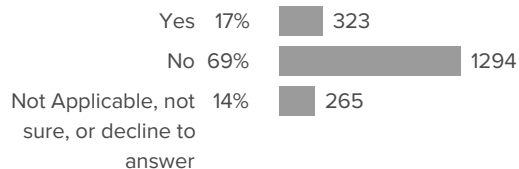
Q.5: In what grade is your child?



Q.6: Special Education Program or has an Individual Education Plan (IEP)?



Q.7: English Language Development (for children learning English)?





MPS

Staff Survey
Spring 2022



Report created by
Panorama Education



Summary

Topic Description	Results	Benchmark
Climate of Support for Academic Learning	<p>95%</p> <p>▼1 since last survey</p>	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
Knowledge and Fairness of Discipline, Rules and Norms	<p>85%</p> <p>▼8 since last survey</p>	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
OVERALL SCHOOL EXPERIENCE	<p>90%</p> <p>▼4 since last survey</p>	
Safety	<p>76%</p> <p>▼13 since last survey</p>	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>
Sense of Belonging (School Connectedness)	<p>83%</p> <p>▼2 since last survey</p>	<p>40th - 59th percentile compared to others in the CORE Districts dataset</p>

356 responses



Climate of Support for Academic Learning

Your average

95%

356 responses

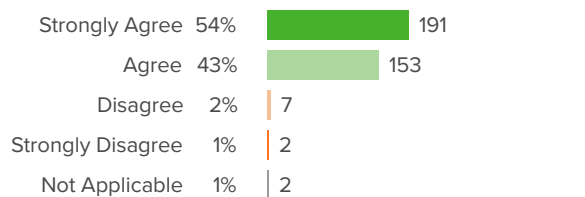
Change

▼ **1**

since last survey

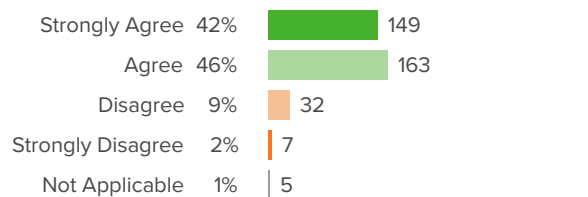
How did people respond?

Q.1: is a supportive and inviting place for students to learn.



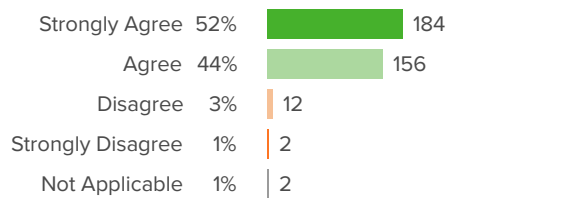
▼ **1** from last survey Favorable: **97%**

Q.2: sets high standards for academic performance for all students.



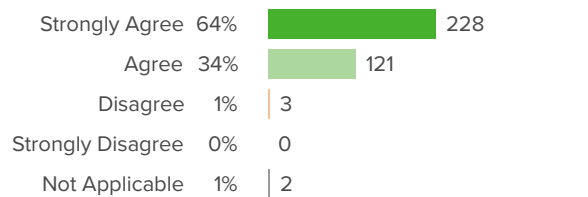
▼ **1** from last survey Favorable: **89%**

Q.3: promotes academic success for all students.



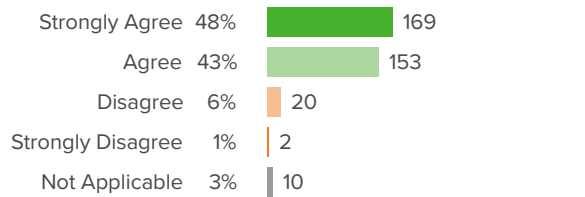
▲ **0** from last survey Favorable: **96%**

Q.4: emphasizes helping students academically when they need it.



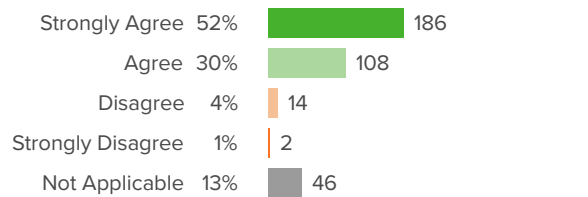
▲ **0** from last survey Favorable: **99%**

Q.5: emphasizes teaching lessons in ways relevant to students.



▼ **3** from last survey Favorable: **94%**

Q.6: encourages students to enroll in rigorous courses (such as honors and AP), regardless of their race, ethnicity, or nationality.



▲ **0** from last survey Favorable: **95%**



Knowledge and Fairness of Discipline, Rules and Norms

Your average

85%

356 responses

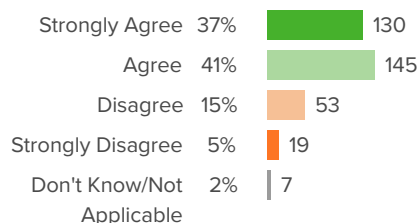
Change

▼ **8**

since last survey

How did people respond?

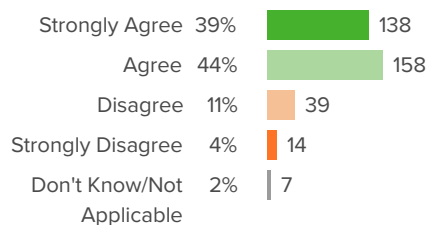
Q.1: This school clearly communicates to students the consequences of breaking school rules.



▼ **6** from last survey

Favorable: **79%**

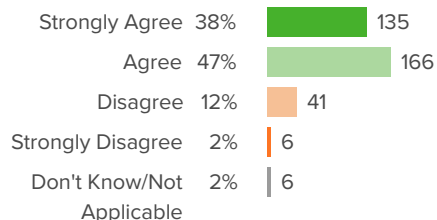
Q.2: Rules in this school are made clear to students.



▼ **7** from last survey

Favorable: **85%**

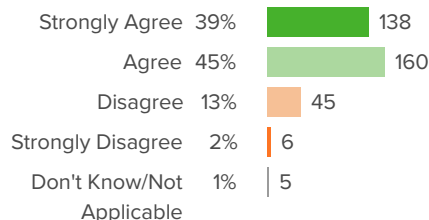
Q.3: Students know how they are expected to act.



▼ **11** from last survey

Favorable: **86%**

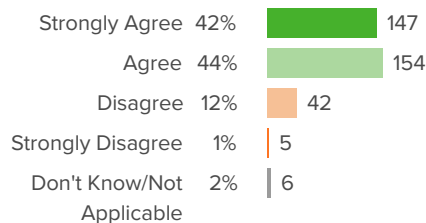
Q.4: Students know what the rules are.



▼ **9** from last survey

Favorable: **85%**

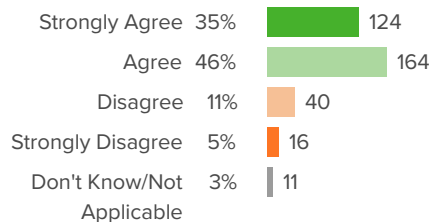
Q.5: This school makes it clear how students are expected to act.



▼ **9** from last survey

Favorable: **86%**

Q.6: This school handles discipline problems fairly.

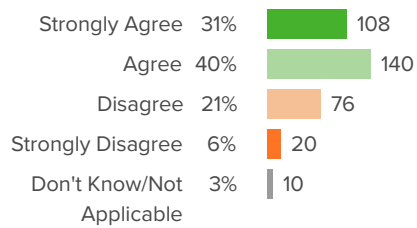


▼ **6** from last survey

Favorable: **84%**



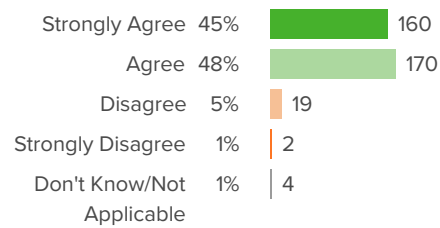
Q.7: This school effectively handles student discipline and behavioral problems.



▼ **13** from last survey

Favorable: **72%**

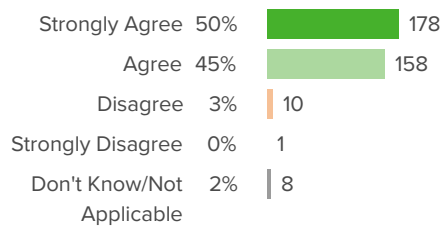
Q.8: Adults at this school treat all students with respect.



▼ **4** from last survey

Favorable: **94%**

Q.9: The school rules are fair.



▼ **2** from last survey

Favorable: **97%**



OVERALL SCHOOL EXPERIENCE

Your average

90%

356 responses

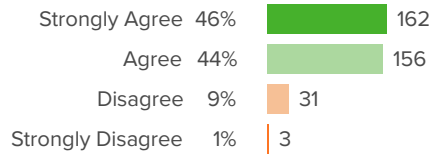
Change

▼ **4**

since last survey

How did people respond?

Q.1: Overall, I am satisfied and would recommend this school to other educators.



▼ **4** from last survey

Favorable: **90%**



Safety

Your average

76%

356 responses

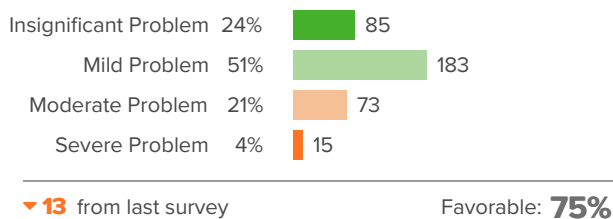
Change

▼ **13**

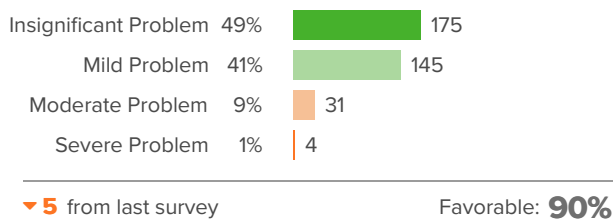
since last survey

How did people respond?

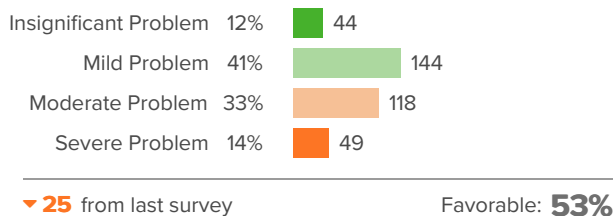
Q.1: harassment or bullying among students?



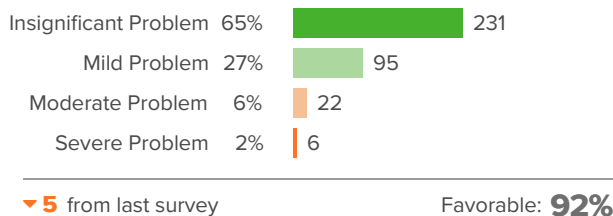
Q.2: physical fighting between students?



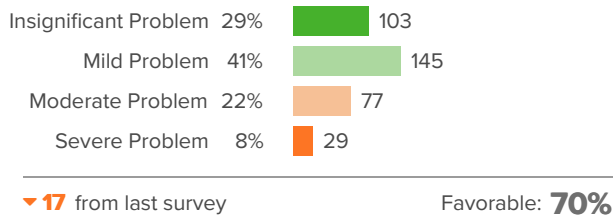
Q.3: disruptive student behavior?



Q.4: racial/ethnic conflict among students?



Q.5: lack of respect of staff by students?





Sense of Belonging (School Connectedness)

Your average

83%

356 responses

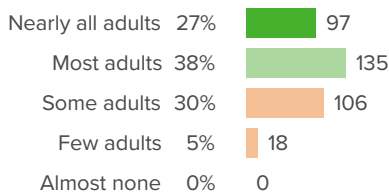
Change

▼ **2**

since last survey

How did people respond?

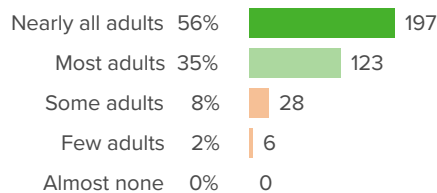
Q.1: How many adults at this school have close professional relationships with one another?



▼ **2** from last survey

Favorable: **65%**

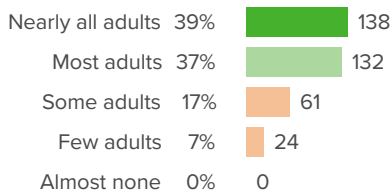
Q.2: How many adults at this school support and treat each other with respect?



▲ **0** from last survey

Favorable: **90%**

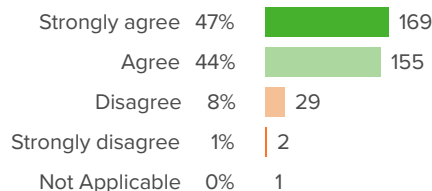
Q.3: How many adults at this school feel a responsibility to improve this school?



▼ **5** from last survey

Favorable: **76%**

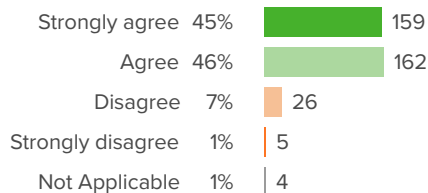
Q.4: This school is a supportive and inviting place for staff to work.



▼ **2** from last survey

Favorable: **91%**

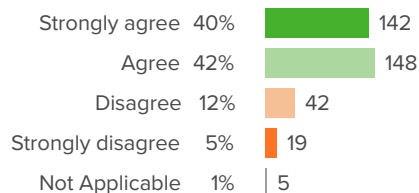
Q.5: This school promotes trust and collegiality among staff.



▼ **3** from last survey

Favorable: **91%**

Q.6: This school promotes personnel participation in decision-making that affects school practices and policies.



▼ **3** from last survey

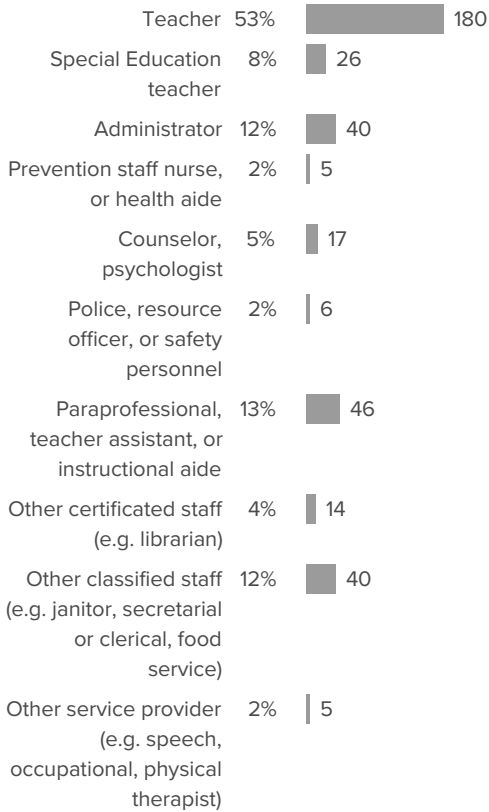
Favorable: **83%**



Background Questions

How did people respond?

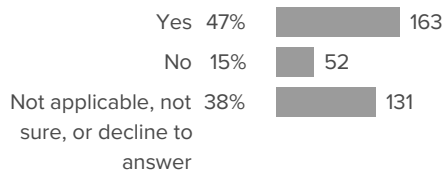
Q.1: What is your role at this school? (Mark all that apply).



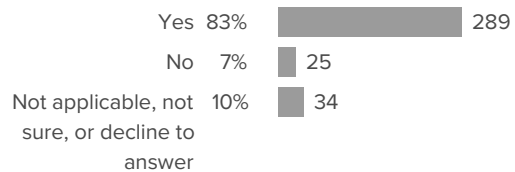
Q.2: Are you a classroom teacher?



Q.3: Migrant education students

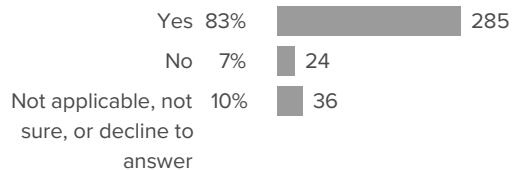


Q.4: Special education students





Q.5: English language learners



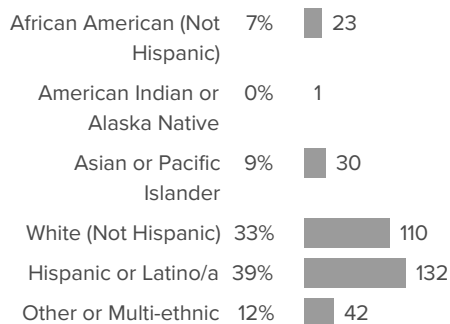
Q.6: How many years have you worked, in any position, at this school?



Q.7: How many years have you worked at any school in your current position (e.g., teacher, counselor, administrator, food service)?



Q.8: What is your race or ethnicity?



MAGNOLIA SCIENCE ACADEMY - 1

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	80.8%	13.8%	86.6%
Spring 2021 Survey Participation Rates:	91.5%	100%	100%
Change since Spring 2021: <i>(percentage points)</i>	-10.7	-86.2	-13.4
Next Year Survey Participation Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.

Student Survey: Student survey percentages decreased due to challenges with having our short-term and long-term independent study (IS) students complete the survey. We had short-term IS due to positive Covid-19 cases and long-term IS students who never attended school for in-person instruction.

Next year, we will follow up with the IS students and have them come to school at least for the survey.

Family Survey: When the response rate was less than 10%, the MSA-1 team called families directly. Families had difficulty with the link provided not working. An MSA-1 staff member whose sibling attends our school had the same difficulty with the link. We had the link on our website.

Next year we will continue to utilize Parent Square messages reminding the parents of the importance of the survey. Additionally, we will have more in-person parent meetings and provide access to technology for them to complete the survey on campus.

Staff Survey: There were nine staff members out of 67 that did not take the survey. Seven of the staff that did not take the survey were non-classroom based positions that did not participate in the Wednesday staff PDs where staff members were provided time to complete the survey.

Next year, we will allot all MSA-1 team members' time to complete their survey during the working day. We will also give in-person reminders to those that may have missed the allotted time to do so on a separate occasion during the working day.

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	66.0%	95.0%	74.0%
Spring 2021 Overall Satisfaction Rates:	84.0%	97.0%	98%
Change since Spring 2021: <i>(percentage points)</i>	-18.0	-2.0	-24.0
Next Year Overall Satisfaction Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

Overall, our satisfaction rates declined for students, families, and staff. Returning to in-person learning while still in the pandemic, our school had to deal with major changes. One of these challenges was less space due to our sister campus, MSA-5 needing to move to our site sharing the campus. This affected operations with a few teachers leaving during the year, which contributed to the lack of consistency of teachers and showed an uptick in behavior incidents. Another challenge was finding qualified teachers to replace the ones who left or needed for growth in the school enrollment. This also contributed to the lack of consistency for the students and families.

The student satisfaction rate was 66%, one of the lowest in recent years. A substantial amount of school culture was lost due to the students being at home during virtual learning. This negatively impacted student satisfaction when they returned, and their daily expectations had changed.

Furthermore, reducing space was more challenging to have robust assemblies and other activities that create a positive culture. Also, the lack of field trips, in-person social, and extracurricular events was affected.

There was a 24% decline in the satisfaction rate for the staff. Many of their concerns were issues with space, lack of discipline for students and the overall attitude of students towards the staff, staff shortages, high turn-over rate, and the grading policy. The P.E. area was a concern as it relates to safety and function. There are many cracks in the asphalt and other areas of concern that could affect safety and not being suitable for a comprehensive P.E. program. Further, the staff communicated that it is difficult to find reliable space to conduct meetings, especially for the psychologists and special ed teachers to assess students.

The MSA-1 team utilizes these findings to plan and prepare for the next school year to help create a more

satisfactory climate. Some of those plans will be to pave the PE areas, bring bungalows in for additional classrooms, have more in-person events for students as long as COVID guidelines remain the way they are, and finally, with the acquisition of Jam, we will have more office space.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	65%	0th-19th percentile	-15
Knowledge and Fairness of Discipline, Rules and Norms	54%	0th-19th percentile	-19
Safety	62%	0th-19th percentile	-8
Sense of Belonging (School Connectedness)	47%	0th-19th percentile	-13

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	97%	80th-99th percentile	0
Knowledge and Fairness of Discipline, Rules and Norms	90%	20th-39th percentile	-5
Safety	76%	0th-19th percentile	-12
Sense of Belonging (School Connectedness)	94%	60th-79th percentile	-2

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
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		dataset	points)
Climate of Support for Academic Learning	92%	40th-59th percentile	-4
Knowledge and Fairness of Discipline, Rules and Norms	74%	20th-39th percentile	-21
Safety	61%	0th-19th percentile	-35
Sense of Belonging (School Connectedness)	66%	0th-9th percentile	-15

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	58.0%	91.0%	73.0%
Spring 2021 Average Approval Rates:	72.0%	95.0%	92.0%
Change since Spring 2021: <i>(percentage points)</i>	-14.0	- 4.0	- 19.0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:
<p>Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?</p>
<p>Students:</p> <p>Our student approval rate decreased by 14%. When we analyzed the survey, we noticed that some students had difficulty transitioning to in-person school after the pandemic. They shared concerns about the food, uniform, cell phone policy, rules/discipline, lack of space, PE facility, and crossing the alley. They also shared some concerns about specific staff members.</p> <p>Families:</p> <p>Our family's approval rate decreased by 4%. Overall, our families like our school and support. Their concerns were about staff turnover, safety (open campus and homeless around the school), and quality of the PE programs.</p>

Staff:

Our staff approval rate decreased by 19%. After virtual learning, the first-year in-person school experience has been difficult for all staff. They shared concerns about sharing the campus with another school, lack of space, staff turnover/morale, disrespectful student behaviors, the Home Office's decisions without having enough staff feedback.

We understand that sharing the campus with MSA-5 caused conflicts and affected some programs. We couldn't continue to offer some STEAM programs like VEX Robotics and Music, and the SPED Department had difficulties doing 1-on-1 assessments. We are working with the Facility Department to resolve the space issues for next year and working on a weekly Social-Emotional -Learning (SEL) curriculum to support our student's better behaviors.

We also know that daily health screening and weekly Covid testing caused interruptions in the classes and tardiness. Due to health and safety reasons, we had to postpone educational field trips. Since Covid cases have gone down and some requirements are lifted, there are no more class interruptions, and teachers have started to schedule field trips.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

We are encouraged to see that many stakeholders like the climate of support for academic learning. Although we had many challenges this school year, we could still provide a rigorous curriculum and intervention programs (after-school tutoring, Saturday school, and Power math/ELA classes) for our students. We have great teachers who have a fantastic rapport with students. Students and parents appreciate teachers' support and see the school as a family. Also, our internal assessment (MAP, IAB) results are promising. For the Fall MAP Testing, 45.4% of students met their growth targets from Fall 2020 to Fall 2021 for math, and 57% met their growth targets from Fall 2020 to Fall 2021 for ELA.

Furthermore, we plan to build upon our successes by utilizing those strategies that have worked and applying them to areas of weakness. This will include using feedback from our community and providing training and support to all who need additional help.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

All stakeholder groups expressed concerns about the lack of space and safety. Our team is working closely with the Facility Dept to bring portable classrooms and acquire the building next store to our campus to provide more space for MSA-1 and MSA-5. We communicate with our local city council member and the LAPD about safety concerns surrounding our campus. We have recently hired two deans of students to help with school culture and safety. One of the two deans was hired to replace a dean who left during the school year, and the other was to help provide additional support to our current challenges.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

Students: Teachers, friends, **family feeling** school and **small class sizes**, academics.

Families: Teachers, admin and staff, strong academic program, **small school and class sizes**, communication between school and home, the after school program, clubs and tutoring,

Staff: Family feeling-school community, collaboration, and respect among teachers, **small school and class sizes**, flexibility, positive environment, autonomy in creating lessons/curriculum.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (**GROWS**)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Facility: We are aware of the concerns regarding the facility and working with the Home Office Facility Dept to buy/lease additional space. We are in escrow for the JAM building, which will be used as a gym, multi-purpose room, and offices. We are also checking a portable classroom option that would help resolve the classroom space and have fewer traveling teachers.

Lack of discipline: Our MS dean of students left in early February, and we hired a new dean of students that started in mid-March. We recently hired another dean of students for MS to help with school culture. Both deans of students have PBIS experience from their previous employment, and they will start implementing PBIS for a positive school climate.

Safety- Open Campus and lack of supervision: We currently have two security guards and three campus aides to provide more supervision and better security. We plan to add one more campus aide to join our team to help with supervising students and watching traffic in the alley. Moreover, we communicate with our local city council member and the LAPD about safety concerns surrounding our campus. The City has removed homeless tents and cleaned the area several times throughout this academic year.

With the addition of two deans of students, we will turn our focus on positive school culture to help alleviate the negative consequences that students are receiving. All admin will focus on implementing PBIS and continue to train teachers.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?
(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Students:

Outdoor Space (Field/PE Area/Lunch Area): We recently moved PE and the lunch area, and students now have more space. The new lunch area needs some improvement and paving. We are in the process of having damaged paved areas and are in discussion to have artificial grass added so that it is not all asphalt. We also set up basketball hoops, volleyball courts, and soccer goals. We will order extra PE equipment so students will have more activities to participate in during their PE classes and during their free time throughout the day. Next year, we will continue having CIF sports and add more sports programs for middle and high school.

Families:

Hiring high-quality teachers: We had staff turnover throughout the beginning of the year. We worked diligently to fill the vacant positions with the best-qualified candidates. Several were new to the education field, and they will need more training and professional development activities to improve their classroom performance. We provided a Kagan student engagement workshop, and next year continue providing PDs for the current and new staff. We still have vacant positions and have already started having interviews for the next academic year. We partner with the CSUN credentialing department and will work with them to find candidates for our vacant positions. We understand there is a teacher shortage issue nationwide, and we will continue to find innovative ways to hire the best staff for our students.

Staff:

Creating a school decision-making committee with admin and competent teachers, office staff, aides, and janitorial staff to help discuss changes for next year: We value our staff's feedback and will seek their input via committees, staff surveys, and staff meetings. Staff have a voice and will have opportunities to share their suggestions during the staff meeting, wrap-up meeting, and summer in-service.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

The school plans to continue to work with the home office to provide more space for both schools (MSA-1 & MSA-5) and alleviate the constraints that both schools feel operationally. Also, we have begun planning and interviewing teachers for the 2022-23 school year to fill any potential voids over the summer and the beginning of the school year. This will help reduce the inconsistency of students having subs or multiple teachers throughout the school year. We will also create a calendar of events for more in-person events for students, families, and staff. These events will include dances, field trips, BBQs, parent training, staff team building, etc. Finally, we will have professional development planned for teacher in-service and throughout the academic year to support our teachers and students.

MAGNOLIA SCIENCE ACADEMY - 2

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the

fall to provide our students with targeted social-emotional support and then measure student responses again in the spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	98.0%	86.3%	100%
Spring 2021 Survey Participation Rates:	95.1%	91.8.%	100%
Change since Spring 2021: <i>(percentage points)</i>	+2.9	-5.51	0.0
Next Year Survey Participation Targets:	95%	85%	100%
Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.			
<p>During the 2021-22 academic year, the participation rate of families decreased by 5.5% over the last year (from 91.8% to 86.3%) and the staff participation rates maintained 100% over the past year. MSA2 did not meet our LCAP target parents participation rate of 90%. MSA2 will consider using both electronic and paper surveys in the future rather than exclusively electronic surveys for all families to help families who have challenges with technology to still have the paper option, while using PACE Coordinator to follow up with each family. While the student participation rate increased by 2.9% over the past year during the 2021-22 academic year (from 95.1% to 98.0 %).</p>			

Overall Satisfaction Rates:

This rate measures our educational partners’ overall satisfaction with the school through their responses to the following question: **"Overall, I am satisfied and would recommend this school to other students / parents / educators."**

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	88%	97%	98%
Spring 2021 Overall Satisfaction Rates:	88%	99%	98%
Change since Spring 2021: <i>(percentage points)</i>	0.0	-2.0	0.0
Next Year Overall Satisfaction Targets:	80%	95%	95%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners’ overall satisfaction.

The overall satisfaction rates for students during the 2021-22 academic year was maintained at 88%. Overall satisfaction rates for families decreased by 2% during the same period of time (from 99% to 97%). In addition, staff overall satisfaction rates maintained a high percent during this time of 98%. These three positive responses in educational partner satisfaction over the past year are due to all educational partners observing that despite the challenges faced after the return to in-person learning following the previous year of distance learning, MSA2 continues to offer improved access to high quality instructional programs as well as provide support to staff and families.

Average Approval Rates:**Student Survey:**

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	80%	60th-79th percentile	-2
Knowledge and Fairness of Discipline, Rules and Norms	67%	60th-79th percentile	-9
Safety	76%	80th-99th percentile	+2
Sense of Belonging (School Connectedness)	65%	60th-79th percentile	+3

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	98%	80th-99th percentile	-1
Knowledge and Fairness of Discipline, Rules and Norms	97%	80th-99th percentile	-1
Safety	96%	80th-99th percentile	-1
Sense of Belonging (School Connectedness)	97%	80th-99th percentile	-1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	95%	40th-59th percentile	-4

Knowledge and Fairness of Discipline, Rules and Norms	77%	40th-59th percentile	-16
Safety	76%	20th-39th percentile	-18
Sense of Belonging (School Connectedness)	92%	40th-59th percentile	+1

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	73%	97.0%	85.0%
Spring 2021 Average Approval Rates:	76%	98.0%	94%
Change since Spring 2021: <i>(percentage points)</i>	- 3	-1	- 9
Next Year Average Approval Targets:	75%	95%	90%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

Over the 2021-22 academic year, students showed a decrease in average approval rating by 3% over the past year (from 76% to 73%). This decrease in student satisfaction rates this year may be impacted by the fact that during the last school year, students were able to spend the majority of their time at home on Zoom, and did not need to go to the school site, as well as did not need to stay in school for as long each school day. This increase in hours of the day which students are now required to be at school and in class may have impacted the decrease in student satisfaction rates during the current school year. During the current school year, MSA2 also continued to offer interventions and support including Saturday School, PBIS weekly house competitions, in-person counselings sessions, in-person support for college applications, after school tutoring and clubs, and support via online resources.

Over the 2021-22 academic year, families approval rates were nearly maintained over the past year with a decrease of 1% from the previous year (from 98% to 97%). We maintained a high percentage of parent meetings and

conferences via Zoom, in person events, including our Friday Coffee with the Principal meetings, Parent Teacher Conferences, PTF meetings, SSC, Title I and ELAC meetings.

Over the 2021-22 academic year, staff showed some decrease in average approval rating by 9% over the past year (from 94% to 85%). Some of the reasons behind this change may be that during the previous school year, staff were able to work remotely for nearly the entire year, and the school day was shorter due to distance learning. Also, the need to focus on areas including classroom management last year was lower while students were on Zoom, since many negative behavioral issues which typically occurred in-person were not as easy to do for students. That being said, this year required teachers to return to a fully in-person school year as well as to return to a longer school day each day. These changes also require teachers to focus more on behavioral management techniques which last year they may not have needed to place as great of an emphasis on. These may be some of the reasons for the decrease in staff satisfaction rates this year, in addition to the other areas shared by staff members in their survey responses.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

For the topic of Climate of Support for Academic Learning, MSA2's students favorable rating is 80% during the 2021-22 academic year. This was a 2 percent decrease since the last academic year. The same topic for families during the current school year showed a 98% favorable rating, which was down by 1 percent from the previous year. Finally, during the current academic year, MSA2's staff favorable rating is 95% for the same topic, which is down by 4 percent since the last academic year.

Despite the decreases across each educational partner for the topic of Climate of Support for Academic Learning in the 2021-22 academic year, these results are actually higher than the MPS average for each educational partner group and demonstrates that MSA2 continues to experience success in this topic. The slight decrease across each of the educational partners in this topic during the current academic year is attributed to the increased challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic, including increased teacher absences during the 2021-22 academic year which were not preventable due to exposure to Covid-19, close contacts and symptoms during the Covid-19 pandemic.

For the topic of Knowledge and Fairness of Discipline, Rules and Norms, MSA2's students favorable rating is 67%

during the 2021-22 academic year. This was a 9 percent decrease since the last academic year. The same topic for families during the current school year showed a 97% favorable rating, which was down by 1 percent from the previous year. Finally, during the current academic year, MSA2's staff favorable rating is 77% for the same topic, which is down by 16 percent since the last academic year.

Despite the decreases across each educational partner for the topic of Knowledge and Fairness of Discipline, Rules and Norms in the 2021-22 academic year, these results are actually higher than the MPS average for nearly all of the educational partner groups and demonstrates that MSA2 continues to experience success in this topic. The decrease across each of the educational partners in this topic during the current academic year is attributed to the increased challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic..

In particular, some of the reasons behind this decrease in the staff category for Knowledge and Fairness of Discipline, Rules and Norms may be that during the previous school year, staff were able to work remotely for nearly the entire year, and the school day was shorter due to distance learning. Also, the need to focus on areas including classroom management last year was lower while students were on Zoom, since many negative behavioral issues which typically occurred in-person were not as easy to do for students. That being said, this year required teachers to return to a fully in-person school year as well as to return to a longer school day each day. These changes also require teachers to focus more on behavioral management techniques which last year they may not have needed to place as great of an emphasis on. These may be some of the reasons for the decrease in staff satisfaction rates this year, in addition to the other areas shared by staff members in their survey responses.

Also, this decrease in student rates this year for Knowledge and Fairness of Discipline, Rules and Norms may be impacted by the fact that during the last school year, students were able to spend the majority of their time at home on Zoom, and did not need to go to the school site, as well as did not need to stay in school for as long each school day. This increase in hours of the day which students are now required to be at school and in class may have impacted the decrease in student satisfaction rates during the current school year. During the current school year, MSA2 also continued to offer interventions and support including Saturday School, PBIS weekly house competitions, in-person counselings sessions, in-person support for college applications, after school tutoring and clubs, and support via online resources.

For the topic of Safety, MSA2's students favorable rating is 76% during the 2021-22 academic year. This was a 2 percent increase since the last academic year, which is a tremendous success for MSA2 to see that students actually feel safer having returned to MSA2 during the current academic year than they did during distance learning last via Zoom last school year at their homes. The same topic for families during the current school year showed a 96% favorable rating, which was down by 1 percent from the previous year. Finally, during the current academic year, MSA2's staff favorable rating is 76% for the same topic, which is down by 18 percent since the last academic year.

Despite the decreases across two out of three of the educational partners for the topic of Safety in the 2021-22 academic year, these results are actually higher than the MPS average for nearly all of the educational partner groups and demonstrates that MSA2 continues to experience success in this topic. The larger decrease across the staff educational partners survey in this topic during the current academic year is attributed to the increased

challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic. In particular, during distance learning, staff did not have to deal with issues of school safety during the distance learning while students were all isolated from each other. In addition, students were not able to interact with other students during the distance learning from the isolation in their homes, so the adjustment which students needed to experience when returning to in-person led to increased behavioral issues at school during the transition period. However, MSA2 has responded to this challenge during the 2021-22 academic year by hiring 1 additional SPED teacher, 3 additional SPED paraprofessionals, 3 additional administrative assistants in the students services department, 1 additional administrative assistant to support the academic department, and 1 additional full time security guard to provide additional supervision and support.

For the topic of Sense of Belonging (School Connectedness), MSA2's students favorable rating is 65% during the 2021-22 academic year. This was a 3 percent increase since the last academic year, which is a tremendous success for MSA2 to see that students actually feel a greater sense of belonging and school connectedness having returned to MSA2 during the current academic year than they did during distance learning last via Zoom last school year at their homes. This area is the greatest area of growth for the students for the topics when compared to the last school year. The same topic for families during the current school year showed a 97% favorable rating, which was down by 1 percent from the previous year. Finally, during the current academic year, MSA2's staff favorable rating is 92% for the same topic, which is an increase by 1 percent since the last academic year. This is a tremendous success for MSA2 to see that staff actually feel a greater sense of belonging and school connectedness having returned to MSA2 during the current academic year than they did working remotely during distance learning via Zoom last school year at their homes.

We are incredibly proud of all of our areas of growth and plan on continuing to focus on taking proactive steps to repeat and build upon these successes. We are also incredibly motivated to continue to work on addressing all of the areas of concern during the upcoming school year and continue to make MSA2 a better school for all educational partners across all categories through our ongoing collaborative approach.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Despite the decreases across each educational partner for the topic of Climate of Support for Academic Learning in the 2021-22 academic year, these results are actually higher than the MPS average for each educational partner group and demonstrates that MSA2 continues to experience success in this topic. The slight decrease across each of the educational partners in this topic during the current academic year is attributed to the increased challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic, including increased teacher absences during the 2021-22 academic year which were not preventable due to exposure to Covid-19, close contacts and symptoms during the Covid-19 pandemic.

Despite the decreases across each educational partner for the topic of Knowledge and Fairness of Discipline, Rules and Norms in the 2021-22 academic year, these results are actually higher than the MPS average for nearly all of the educational partner groups and demonstrates that MSA2 continues to experience success in this topic. The decrease across each of the educational partners in this topic during the current academic year is attributed to the increased challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic..

In particular, some of the reasons behind this decrease in the staff category for Knowledge and Fairness of Discipline, Rules and Norms may be that during the previous school year, staff were able to work remotely for nearly the entire year, and the school day was shorter due to distance learning. Also, the need to focus on areas including classroom management last year was lower while students were on Zoom, since many negative behavioral issues which typically occurred in-person were not as easy to do for students. That being said, this year required teachers to return to a fully in-person school year as well as to return to a longer school day each day. These changes also require teachers to focus more on behavioral management techniques which last year they may not have needed to place as great of an emphasis on. These may be some of the reasons for the decrease in staff satisfaction rates this year, in addition to the other areas shared by staff members in their survey responses.

Also, this decrease in student rates this year for Knowledge and Fairness of Discipline, Rules and Norms may be impacted by the fact that during the last school year, students were able to spend the majority of their time at home on Zoom, and did not need to go to the school site, as well as did not need to stay in school for as long each school day. This increase in hours of the day which students are now required to be at school and in class may have impacted the decrease in student satisfaction rates during the current school year. During the current school year, MSA2 also continued to offer interventions and support including Saturday School, PBIS weekly house

competitions, in-person counselings sessions, in-person support for college applications, after school tutoring and clubs, and support via online resources.

Despite the decreases across two out of three of the educational partners for the topic of Safety in the 2021-22 academic year, these results are actually higher than the MPS average for nearly all of the educational partner groups and demonstrates that MSA2 continues to experience success in this topic. The larger decrease across the staff educational partners survey in this topic during the current academic year is attributed to the increased challenges that MSA2 faced in returning to in-person learning following during the Covid-19 pandemic. In particular, during distance learning, staff did not have to deal with issues of school safety during the distance learning while students were all isolated from each other. In addition, students were not able to interact with other students during the distance learning from the isolation in their homes, so the adjustment which students needed to experience when returning to in-person led to increased behavioral issues at school during the transition period. However, MSA2 has responded to this challenge during the 2021-22 academic year by hiring 1 additional SPED teacher, 3 additional SPED paraprofessionals, 3 additional administrative assistants in the students services department, 1 additional administrative assistant to support the academic department, and 1 additional full time security guard to provide additional supervision and support.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

Based upon the free responses to this question, the below strengths are visible in the student survey for MSA2

during the 2021-22 academic year:

- Friends/peer relationships
- Teachers and staff (nice/kind/supportive) (several teachers mentioned by name)
- Small school environment (safe/chill)
- Activities/celebrations/festivals (pizza/ice cream)
- Can go to many staff members for help

Based upon the free responses to this question, the below strengths are visible in the family survey for MSA2 during the 2021-21 academic year:

- Hard work and dedication from all the employees
- Security is always on duty even after school
- The communication tools between school and families
- Friendly staff
- The Unity and expectations of the school
- Life skills class

Based upon the free responses to this question, the below strengths are visible in the staff survey for MSA2 during the 2021-22- academic year:

- Welcoming for all Educational Partner
- Teachers are hard-working and collaborating
- Supportive staff and Admin
- Activities
- School Culture

Based upon the free responses to this question, the below strengths are visible as patterns across all stakeholder groups, including students, families and staff for MSA2 during the 2020-21 academic year:

- Staff are friendly, dedicated, approachable, and supportive
- Effective structures to enhance ongoing communication between school and home
- Positive school culture and union with clear expectations
- School leadership team is encouraging and provides comprehensible expectations
- Robust after school program which integrates increased opportunities for competitive CIF sports

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Based upon the free responses to this question, the below areas of growth are visible in the student survey for MSA2 during the 2021-22 academic year:

- ❖ Lack of certain facilities, bathrooms
- ❖ Food
- ❖ Assignments
- ❖ Student's Behavior
- ❖ Uniform Policy

Based upon the free responses to this question, the below areas of growth are visible in the families survey for MSA2 during the 2021-22 academic year:

- ❖ Minor tweaking, drop off and pick up
- ❖ More proactive to reach out to parents from teachers
- ❖ No Robotics
- ❖ Student grouping
- ❖ Teacher turn over

Based upon the free responses to this question, the below areas of growth are visible in the staff survey for MSA2 during the 2021-22 academic year:

- ❖ Students behavior
- ❖ Pay
- ❖ Facility issues; not enough space for storage/classes
- ❖ Lack of discipline; lack of student consequences

Based upon the free responses to this question, the below areas of growth are visible as patterns across all stakeholder groups, including students, families and staff for MSA2 during the 2020-21 academic year:

- ❖ Improve access to facilities (field, school entrance,)
- ❖ Strong After school programs- Robotics
- ❖ Offer better student meals
- ❖ Follow-up on having clear consequences for disruptive students (cell phone usage among students, bad language, etc

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Based upon the free responses to this question, the below are suggestions which are visible in the student survey for MSA2 during the 2021-21 academic year:

- Gymnasium and Soccer Field
- Strong After School programs
- Better food and lunch area
- Dual Enrolment Class
- No uniform Policy
- Improve Internet
- Restrooms (soap, remodeling, cleanliness)

Based upon the free responses to this question, the below are suggestions which are visible in the families survey for MSA2 during the 2020-21 academic year:

- Add Electives
- Facilities /Plant a huge tree in the middle of the entrance
- Robotics is needed
- Better communication between teachers and parents

Based upon the free responses to this question, the below are suggestions which are visible in the staff survey for MSA2 during the 2020-21 academic year:

- New facility; move to a different location; more space
- Clear consequences for disruptive students
- STEAM Focus
- Sports, more advanced programs

Based upon the free responses to this question, the below suggestions are visible as patterns across all stakeholder groups, including students, families and staff for MSA2 during the 2021-22 academic year:

- Clear consequences for disruptive students
- STEAM Focus- Strong After School
- Better food
- Facility improvement
- Sports, more advanced programs

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

- By July 2024, MSA 2 will acquire a new facility. This will be accomplished through weekly meetings with facility team will continue to take place in order to search for a new location to purchase for MSA2
- Additional school spirit opportunities will be provided to students to continue improving school culture and climate (maybe student taskforce to create a monthly calendar?)
 - Monthly stakeholder survey to rate the past month's activities -
 - Maintain or increase student satisfaction for 80 % of the months
- Continue to increase collaboration between teachers within science and math departments to increased kinesthetic and tactile experiments supporting student learning
 - Survey students regarding the number of activities they have done in their math and science classes - experiment based and kinesthetic.
 - Improved or at least maintained activity rates - monthly
 - School Wellness Committee to provide PD to staff at least once per month to increase kinesthetic activities in the classroom
 - Teachers share their kinesthetic activities done in the classroom - report once per month
- Continue to build a nurturing environment with friendly, dedicated approachable and supportive staff by having ongoing professional development related to SEL support of students
 - Monthly PD to build capacity of staff - trauma sensitive practices, classroom management strategies, and SEL
 - Survey students monthly related to how the students perceive teachers interactive with them in terms of positive affirmations and support, kindness, and patience. Increase or maintain rates (Panorama has check-in feature - check with Jason regarding this feature)

- Increase school-wide fun activities to build better relationships among students and keep them motivated by holding at least 1 school-wide fun activity per month.

MAGNOLIA SCIENCE ACADEMY - 3

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	84.9%	37.3%	97.5%
Spring 2021 Survey Participation Rates:	83.1%	87.1%	100.0%
Change since Spring 2021: <i>(percentage points)</i>	+1.8	-49.8	-2.5
Next Year Survey Participation Targets:	≥86.0%	≥60.0%	≥100.0%
Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.			
<p>The participation rates for the Spring 2022 survey have increased in the students survey by 1.8 percentage points. The family participation rates have decreased by 49.8 percentage points. The staff survey percentage was actually 100% due to one staff member being on leave and could not take the survey. The most significant change in the survey was the family percentage points due to the online access and overall covid situation that affected our families.</p>			

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	76%	96%	87%
Spring 2021 Overall Satisfaction Rates:	77%	95%	95%

Change since Spring 2021: <i>(percentage points)</i>	-1.0	+1.0	-8.0
Next Year Overall Satisfaction Targets:	≥78.0%	≥97%	≥89.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

MSA-3 satisfaction rates remained similar to 2021 survey data in student and parent groups.

-8% decline in staff satisfaction rates is related to facility issues and the challenges of teaching after in-person school post pandemic.

Facility is a constant issue for MSA-3. Being on Prop-39 facility limits the school's ability to assign a classroom to all teachers. Due to decline of MSA-3's enrollment at LAUSD vicinity, the number of classrooms/offices/special ed rooms MSA-3 received decreased from 20 to 17. This created a challenge for five teachers to travel from class to class. It was also a challenge to the host teacher. Host teacher had to welcome another class/teacher during his/her prep time.

In-person school during the pandemic created additional challenges to teaching. Teachers and support staff had to teach with masks and enforce mask mandates in the classroom. Weekly Covid testing and morning health check were additional tasks that staff had to carry on.

However, MSA-3 received the highest rating in all areas excluding the 2021-22 Pandemic era distance learning ratings. Before the pandemic, satisfaction rates for students were around 60%. Family satisfaction survey was around 85% and the staff satisfaction rate was around 75%.

Three years average for in-person data for student satisfaction: 62% This year's data: 76

Three years average for in-person data for families: 84% This year's data: 96

Three years average for in-person data for staff: 77% This year's data: 87

When compared with similar in-person teaching settings, MSA-3 is well improved in all these three areas.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 <i>(percentage)</i>
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			<i>points</i>)
Climate of Support for Academic Learning	70%	20th-39th percentile	-7
Knowledge and Fairness of Discipline, Rules and Norms	60%	40th-59th percentile	-10
Safety	70%	20th-39th percentile	-7
Sense of Belonging (School Connectedness)	54%	20th-39th percentile	+1

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (<i>percentage points</i>)
Climate of Support for Academic Learning	97%	80th-99th percentile	+ 3
Knowledge and Fairness of Discipline, Rules and Norms	95%	60th-79th percentile	+ 2
Safety	94%	60th-79th percentile	0
Sense of Belonging (School Connectedness)	97%	80th-99th percentile	+ 2

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (<i>percentage points</i>)
Climate of Support for Academic Learning	90%	20th-39th percentile	- 2
Knowledge and Fairness of Discipline, Rules and Norms	85%	40th-59th percentile	- 6
Safety	63%	20th-39th percentile	- 4
Sense of Belonging (School Connectedness)	76%	20th-39th percentile	- 5

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	64%	96%	80%
Spring 2021 Average Approval Rates:	67%	95%	85%

Change since Spring 2021: <i>(percentage points)</i>	- 3.0	+ 1.0	- 5.0
Next Year Average Approval Targets:	≥66.0%	≥97.0%	≥82.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:
Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?
<p>MSA-3’s approval rates slightly went down for students and staff around 3% and 5% respectively. We attributed the decline due to challenges of in-person education compared to distance learning rating last year. However, historically, MSA-3 got the highest rating for all groups. Our in-person learning data for the last three years and this year's data is below.</p> <p>Three years in-person data for students: 56% This year’s data: 64</p> <p>Three years in-person data for families: 89% This year’s data: 96</p> <p>Three years in-person data for staff: 69% This year’s data: 80</p> <p>MSA-3 takes pride in improving in all these areas. We attribute the success to having more student oriented learning environments. Our intervention is geared towards students' needs in Math and English.</p> <p>For decline in staff, we attribute the issue with the challenges of in-person learning during the pandemic. Teaching with masks, weekly Covid testing impacted our staff’s tasks. In addition, challenges around Prop-39 added more responsibility on our traveling teachers as well as receiving teachers. This year, we have had five teachers rotate classrooms. This is an issue to have set classroom procedures, prepare materials and equipment for the traveling teachers.</p> <p>Student approval rate increase is due to student center activities like assemblies, student leadership events, spirit week activities, field trips.</p>

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Topic 1: Climate of support for academic learning, was found to have the highest approval rate for students, families, and staff. This aligns to the questions with the high approval rates that the teachers emphasize helping students academically when they need it and give students a chance to take part in classroom discussions or activities. In order to maintain this success, teachers will continue to provide academic interventions to students in the form of clear late-work policies, after school tutoring, and Saturday School sessions. Teachers will also continue to reach out to families for students with a high number of fails at each progress report and provide virtual home visit conferences to plan goals & action steps for improvement.

The students feel the campus is a safe place (topic 3: safety) and would overall recommend the school to other students. Families appreciate that the school treats them with respect and that the school staff is helpful (aligns to topic 4: sense of belonging.) And the staff rated that the school is a supportive and inviting place for students to learn with fair rules (topic 2: knowledge and fairness of discipline.)

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

We have found the following items as identified needs:

- Add sports teams (football, **soccer**, baseball)- A middle school flag football team has been added. For the 2022-2023 year assistant coaches will be added to each team.
- Student bathrooms (dirty, vandalism)- A restroom schedule will be created and student expectations for the restrooms will be added.
- Facilities; not having enough rooms for every teacher
- More activities/electives for students
- Limited staff that speak Spanish (we hired 2 bilingual employees after this survey has been taken: one front office staff and one PACE coordinator)
- Student discipline, student consequences need to improve- More discipline training has been added to the PD's. A data system has been added to track infractions.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

- We see a general trend why our educational partners choose us: small school/classes, community/family feeling.
- Survey reveal that MSA-3 was able to focus on all student's needs, no student gets neglected
- Parents mention that it is easy to get help (tutoring, Saturday school, mentors)
- Staff and school overall culture are positive.

- Also, communication between staff, students and families is productive.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Educational partners mention that we need to add sports teams (football, **soccer**, baseball), more activities/electives for students

Our parents and students point out to the conditions of student bathrooms (dirty, vandalism)

Our staff has concern about the facilities; not having enough rooms for every teacher

Our parents and staff had a concern on limited staff that speak Spanish

Staff pointed out that student discipline, student consequences need to improve.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL? (SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

These areas emerged as areas of improvement.

Students: 1) Improve the school food, 2) Add sports teams, 3) Keep bathrooms clean

Family: 1) Increase Arts, Music and Robotics programs, 2) Offer coffee with the principal in the morning and evening, 3) Check-in with students on independent study.

Staff: 1) Student discipline, student consequences need to improve, 2) Solid uniform plan, 3) More activities/electives for students

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

Action steps for student suggestions:

1. We are planning to address the school food concerns by providing students a survey to voice specifics on which meals they like and do not like. This feedback will be communicated to our vendor to increase food options that the students will actually consume. 2. In addition to our current CIF sports teams, we are also planning to add a girl's basketball and soccer team next year. 3. To address restroom cleanliness, a bathroom supervision schedule will be implemented to ensure organization of bathroom usage and frequent checks.

Action steps for family suggestions:

1. Digital art classes will be offered to more grade-levels. For additional art or music classes, high school students will be encouraged to look into dual enrollment course opportunities. Coffee with the principal meetings will be recorded and shared out to increase accessibility of information shared to all families. 3. An additional staff member will be hired next school year to provide support with independent study SEL, attendance, and grade check-ins.

Action steps for staff suggestions:

1. DOS team will create clear flowcharts that define teacher managed vs. office managed behaviors as well as consequences for tier 1, 2, & 3 infractions. 2. A solid uniform plan will be established that will be shared with teachers in summer PD to bolster the system of morning uniform checks 3. Teacher stipends will include after school clubs to provide more activities for students; elective options will also be increased to add a speech/debate elective.

MAGNOLIA SCIENCE ACADEMY - 4

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	100.0%	95.8%	100.0%
Spring 2021 Survey Participation Rates:	100.0%	83.3%	100.0%
Change since Spring 2021: <i>(percentage points)</i>	0.0	+12.5	0.0
Next Year Survey Participation Targets:	≥80.0%	≥80.0%	≥80.0%
<p>Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.</p> <p>Our participation rates increased overall in the parent educational partner category. We maintained a 100% participation rate in the staff and student category. All of the MSA-4 students and staff have completed their survey.</p> <p>Historically, MSA 4 always had low parent survey participation. As a team, we have effectively and consistently communicated with the parents to make sure parents have completed their surveys. So as a result, we have improved the parent participation rate by 12.5 percent points. We also consistently follow up with teachers and students to make sure all of our students complete their surveys. All of the educational partner surveys were completed online this school year.</p>			

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	82.0%	97.0%	100%
Spring 2021 Overall Satisfaction Rates:	91.0%	99.0%	93%
Change since Spring 2021: <i>(percentage points)</i>	-9.0	-2.0	+7.0
Next Year Overall Satisfaction Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

MSA-4 has high satisfaction rates in all stakeholder categories, although there is a decline in student and parent survey categories.

The students' survey result showed a decrease in the overall satisfaction rate by 9.0 percentage points. MSA-4 students are happy with the support that they have received from teachers and the admin team. The student survey data also has shown that most of the students were satisfied with small school and classroom sizes and the support they receive from teachers and staff. On the other hand, students raised concerns about restrooms being locked, uniform policy, and school meals. They expect the school to offer more sports and after-school activities.

The parent satisfaction rate slightly decreased by 2.0 percentage points. All parents are happy with the support that their children receive from MSA 4. Parents commented positively about the effective communication made by the teachers and administration. The parents are also satisfied with the healthy and positive school environment. Some parents suggested implementing more extra curricular fun activities to keep students socially engaged.

There was a 7.0 percentage point increase in teacher satisfaction rate. The staff enjoys working in a family-like and small school environment. They are happy with the supportive and collegial school environment. Some teachers stated that their voice is being heard in the decision-making process. MSA-4 staff raised concern about having limited space, consistency in the follow through of discipline. The staff suggested integrating a music program into our course offerings.

Average Approval Rates:Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	81%	80th-99th percentile	-7
Knowledge and Fairness of Discipline, Rules and Norms	70%	60th-79th percentile	-12
Safety	80%	80th-99th percentile	+4
Sense of Belonging (School Connectedness)	58%	40th-59th percentile	-5

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	98%	80th-99th percentile	0
Knowledge and Fairness of Discipline, Rules and Norms	98%	80th-99th percentile	-1
Safety	97%	80th-99th percentile	-2
Sense of Belonging (School Connectedness)	98%	80th-99th percentile	-1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	97%	60th-79th percentile	-2
Knowledge and Fairness of Discipline, Rules and Norms	89%	40th-59th percentile	-4
Safety	74%	20th-39th percentile	-13
Sense of Belonging (School Connectedness)	91%	80th-99th percentile	+1

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	74.0%	98.0%	89.0%
Spring 2021 Average Approval Rates:	79.0%	98.0%	92.0%
Change since Spring 2021: <i>(percentage points)</i>	- 5.0	0.0	- 3.0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

MSA-4 has observed decreases in the area of our overall approval rating with student and staff surveys. Students and staff had a hard time transitioning from distance learning to in-person learning. Additionally, students struggle adapting to in-person classroom settings which causes an increase in misbehavior.

The MSA-4 team continued implementing and refining school-wide policies to improve both academic and social-emotional outcomes for our students. We periodically receive feedback from all educational partners on our current practices during the stakeholder meeting and adjust our practices accordingly for our students to succeed.

MSA-4 Team diligently modified the practices depending on the criticism and suggestions that were gathered during these meetings. We work collaboratively with the home office support team to adjust our academic and discipline policies to support our students academically and behaviorally. We follow the current developments in MTSS and implement new strategies that are suitable for our school environment.

We encourage our teachers to join PDs to learn about new educational developments for improving their instructional practices.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Successes:

- MSA-4 approval rate was above the MPS average in all categories.
- We maintained a high approval rating for all categories.
- We improved the parent participation by +12.5 percentage points.
- In the 2021-22 school year, MSA 4 accomplished its highest parent participation rate as compared with the past five years.
- Students' approval rate increased for safety by 4 points.
- MSA 4 maintained high approval rates in all educational partner categories.

Highest Approval Rates:

- Climate of Support for Academic Learning in the student category with 81%.
- The climate of Support for Academic Learning, knowledge and fairness of discipline and rules and norms, and a sense of belonging in the parent survey category with 98%.
- The climate of Support for Academic Learning in the staff category with 97%.

We are most proud that we have high approval rates in all categories as compared to other Magnolia Schools. We are also proud that 80 % of our students feel safe at our school while returning for distance learning. Although there is a brief decline, we are proud of maintaining a high approval rate for Knowledge and Fairness of Discipline, Rules, and Norms, and Safety in our student and staff surveys based on the rest of MPS. The survey results helped us notice that communication is very important to build positive and safe learning environments for all educational partners. We will further analyze our survey results to continue building upon the strategies that are working.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Needs:

Sense of belonging is the category with the lowest approval rate. The sense of belonging to school can be described as the perception of students as individuals, respecting their existence, and supporting them in the social environment of the school.

As we analyzed the free student responses, we encountered similar results with the previous years. Students still are not proud to be part of the MSA-4 community. Sense of belonging has been the most concerning issue at MSA-4 for several years now.

The low sense of belonging to the school, unfortunately, translates as low attendance, low preparation for school, and low levels of obedience to school and classroom rules. From this viewpoint, the sense of belonging to school is the single most important topic that we will address as the greatest need for improvement for the next school year as it directly affects the other survey topic.

Next Steps:

1. Involving all educational partners to create community norms.
2. Listening to students and teachers to share their experiences of feeling uncertain about their belonging to the school.
3. Emphasizing common purposes and ideals.
4. Organizing more professional development around culturally responsive teaching.
5. Organizing more community-building activities and involving students in the process.
6. Implementing more cooperative learning activities in which classrooms work together to achieve a common purpose.
7. Cultivating respectful, supportive relationships among students, teachers, and parents.
8. Organizing more school events to provide opportunity for students to get to know teacher other
9. Implementing team sports where our school community can support and improve school spirit.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

<p>Findings Based on Free-Response Questions:</p>
<p>WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)</p> <p>Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?</p>
<p>Free responses showed that all educational partners are happy to be part of a small family-like environment. Many students and parents emphasize the support that students receive from teachers. The following are the glows identified based on the survey free responses.</p> <ol style="list-style-type: none"> 1. Small and family-like school environment. 2. Loving, caring, supportive and dedicated teachers and staff. 3. Students are happy with the block schedule. 4. Students are happy to return to in-person learning. 5. Teachers and staff are doing their best to keep the students' motivation high.
<p>WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)</p> <p>Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?</p>
<p>Food and uniform policy are common concerns by all of the educational partners. Improvement of the facility, discipline policies and classroom management are the areas that will need our close attention for the next school year. The following are the growth areas identified based on the survey free responses.</p> <ol style="list-style-type: none"> 1. The meals need to be improved. 2. Students and parents want the school to organize more extracurricular activities to keep the students socially involved.

3. All educational partners request the school to implement a visual and performing arts program.
4. Uniform policy improvement
5. More feedback on rules and consequences.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Our educational partners made suggestions regarding facility improvement and moving to a new campus. Many students made suggestions regarding adding more extracurricular activities such as music and sports. Teachers suggested developing strategies to increase parent involvement. The parents and students suggested improving the food quality.

Student Survey:

1. Improve the school food, add vending machines
2. Get a bigger campus
3. Unlock the bathrooms, don't make students go to the office to get the key (wastes class time), stock soap and toilet paper in restrooms
4. Eliminate uniforms
5. Add more engaging activities, and sports for students

Parent Survey:

1. Add more sports teams
2. More engagement for students in Independent studies
3. Teach students finance and skills to help them with budget management.
4. After-school program for seniors dedicated to FAFSA and applying for scholarships

Staff Survey:

1. Music program
2. More feedback on rules and consequences
3. Promote work-life balance more

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

- By August 2022, we will plan and implement a visual art program by using our A-G Grant and/or creating a partnership with community colleges.
- By July 2022, we will collaborate with Schools in Action to identify a new vendor or course of action to increase the food quality
- By September 2022, we will work with the home office and create at least two sports teams to participate in the 2022-23 CIF sports league.
- By October 2022, we will work with our educational partners to design a more appealing uniform to increase student buy-in.
- By the beginning of the 2022-23 school year, we will implement a PLC with our teachers and staff during summer in-service to analyze and improve our school norms to ensure a collective understanding of behavioral expectations from our students.

MAGNOLIA SCIENCE ACADEMY - 5

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	98.7%	70.8%	100%
Spring 2021 Survey Participation Rates:	98.3%	96.8%	100%
Change since Spring 2021: <i>(percentage points)</i>	+0.4	-16.0	0
Next Year Survey Participation Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.

Student participation rates went up from spring 2021 to spring 2022. Survey participation may have increased with the free dress incentives and field trips. Veteran staff and new hires were more engaged than last year on filling out the survey by the deadline. Family survey rates went down and this could be attributed to technological limitations of families having wi fi access, adapting to life changes which took place during the pandemic and for new families not being accustomed to Parent Square which is where the survey was communicated mostly. Paper based forms have been discussed as a way to work around any technological issues.

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	81%	97%	96%

Spring 2021 Overall Satisfaction Rates:	90%	99%	96%
Change since Spring 2021: <i>(percentage points)</i>	-9	-2	0
Next Year Overall Satisfaction Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

Our observations regarding students dealing with a new location, integrating back from online to in person learning and adapting to protocol changes may alter students' view of their educational setting. We also have new teachers so students are adapting to new classrooms and new staff. Regarding family surveys, the two major areas of concern safety and parking lot issues are being re-evaluated. We will be looking at creating a safety committee. The lunch and nutrition area have recently been moved to a covered tent area east of where they previously were located. Families have often commented on the area not being desirable. The tentative plan for MSA5 is to secure our new location in August 2024. Implementing this plan into action will alleviate a lot of these concerns and create a more open platform for troubleshooting any new challenges. When folks feel safe and are already invested in the MSA community, our enrollment numbers will most likely increase.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 <i>(percentage points)</i>
Climate of Support for Academic Learning	79%	60th-79th percentile	-7
Knowledge and Fairness of Discipline, Rules and Norms	70%	60th-79th percentile	-8
Safety	70%	40th-59th percentile	+2
Sense of Belonging (School Connectedness)	56%	20th-39th percentile	-11

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	98%	80th-90th percentile	0
Knowledge and Fairness of Discipline, Rules and Norms	97%	80th-90th percentile	-2
Safety	90%	40th-50th percentile	-3
Sense of Belonging (School Connectedness)	96%	80th-90th percentile	- 1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	96%	20th-39th percentile	-3
Knowledge and Fairness of Discipline, Rules and Norms	98%	40th-59th percentile	-1
Safety	89%	20th-39th percentile	-2
Sense of Belonging (School Connectedness)	83%	40th-59th percentile	+2

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	70%	96%	92%
Spring 2021 Average Approval Rates:	76%	97%	96%
Change since Spring 2021: (percentage points)	-6	-1	0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥90.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

<p>Findings Based on Average Approval Rates of Survey Topics/Questions:</p>
<p>Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?</p>
<p>There has been a decrease in approval rates in each of our categories. Sense of Belonging was the biggest drop at 56%, which will be caused by the location change as we establish our presence on the new campus. Knowledge and Fairness of Discipline, Rules and Norms is an area where we need to work on averaging at 70% compared to past, there is a decline. For this category, there needs to be a collaborative effort to communicate the rules and policies school-wide.</p> <p>We do have two new teachers who just joined our team in February, one of which is struggling greatly especially with school/class discipline. Other than this one person, everyone seems to be happy as they find most categories as agreeable. I am pleased to see that more staff feel a sense of belonging as we have implemented new ways to connect the staff to the school. We will continue to support those who may be struggling with their overall happiness at MSA5. There are a few statements that went from strongly agreeing to agreeing which also dropped down our score. There are a few reasons that could be affecting this change, one being that we move sites from Reseda HS to MSA-1, another being that we changed our grading policy due to the pandemic to close the achievement gap. Lastly, our staff are curious about our school's future location and whether getting our own site is a fact or a dream.</p>
<p>Reflections: Successes</p> <p>Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)</p>
<p>Parents showed their satisfaction through the survey averaging +95% in most of the categories, that's why MSA-5 thrives on word of mouth type of student enrollment more.</p> <p>Teachers feel that adults at MSA-5 treat each other with respect and that MSA-5 promotes inclusion. We increased greatly in the section that states that the school allows for participation in decision-making. 100% of the staff feel that the school is a supportive and inviting place for them to work. 100% of the staff also feel that staff help</p>

students academically when needed. In regards to discipline, bullying has decreased, and fighting is an insignificant problem. Treatment of peers such as racial disparities is not a significant problem. Staff also feel that the school rules are fair and that the school handles disciplinary problems fairly. 100% of the staff feel that students know the school rules and expectations.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Students feel that more extracurricular programs and sport activities are needed, which will be resolved with a new facility. In the meantime, the admin team will use the available human capital to offer more variety of programs utilizing most recent grants.

Teachers feel that disruptive behavior has increased from the previous year (-1%). This may be partly due to the fact that instruction was done through zoom which left little room for disruptive behavior. Setting high expectations for student learning decreased slightly from last school year. A few staff members are not happy about the fact that if our students don't turn anything in, they still get a 50. I believe this is why we decreased in this category. A few staff members also mentioned issues with our disciplinary actions and how they are now being handled in comparison to previous years. We plan on addressing these issues in our staff PDs and having teachers come up with ways that the admin team can further support the team. In addition, we plan on continuing to check in with our teachers and gain their feedback in these categories.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:**WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)**

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

Students appreciate that school hosts fun/enjoyable activities such as games during lunch, hot chocolate day, plenty of field trips, so students see that teachers are helpful and caring of students. In addition school rules, health and safety guidelines and expectations are enforced fairly and equitably, for which parents feel that the school communicates effectively. The faculty believes that the admin team supports the staff for various projects and personal matters. Therefore, our focus is to support teachers to develop stronger collaborative culture among colleagues and students, that's why we adopted "train the trainer" model and sharing the "promising practices" for "Adaptive School" PD series and other instructional programs such as GIMKIT, myON, NWEA etc, which really establish a small family environment. Lastly, staff outing activities (Thanksgiving potluck at Balboa park, End-of-year luncheon at a local restaurant and staff bowling) are appreciated

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Students, parents and staff showed their request to secure a permanent location, which is under the way. Sharing a campus with uncertain future affected the survey results and is a struggle to build a strong school culture. Nonetheless, facility limitation is a challenge to achieve our mission and fulfill the school mission as a true science academy.

MSA-5 team recognizes the support of the home office and MSA-1's hospitality in regards to being co-located and facility research.

There seems to be a pattern in students not being happy with dress code/uniform. We can improve by having more variety for uniforms and explaining the reason why the uniform policy is conducive.

Parents' concerns with homeless people and illegal activity in the area. To make the school feel more safe we have to strengthen communication with LAPD about the homeless population and mobilize the security guards more effectively .

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Students,parents and staff all suggest that we need our own facility. Having our own facility will help with fulfilling our promise to the parents in terms of being a high achieving school with a strong school culture emphasizing STEAM. In the meantime, the MSA-5 team will work with the host school for the bathroom situation, parking, PE area, and bell schedule in order to have the best outcome for both communities.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

Los Lobos will continuously work with the MPS Facility Department to finalize the plans for the future home of MSA-5, then have transition and student recruitment plans working with the MPS Outreach & Communications Department involving all our educational partners and incorporate student testimonials to secure a facility by July 2024. MSA-5 and MSA-1 teams will discuss a plan to organize the parking structure and PE area arrangements by April 2022. Moreover, DOS will meet with MSA-1 DOS to discuss communication with LAPD for Homeless population by April 29,2022

The Student Council and Restorative Justice committees will work with students to design new uniform styles to have more variety minimizing hoodies. It will help with branding within the school community. We'll offer an educational piece to demonstrate the why, and create more free dress opportunities such as college days, etc.) by October 2022

MSA-5 team will continue to offer social activities and recognition for staff by June 2022

Lastly, Los Lobos will be given more opportunities to expand the programs such as more Advanced Placement, dual enrollment, accelerated math courses.

MAGNOLIA SCIENCE ACADEMY - 6

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	100%	100%	100%
Spring 2021 Survey Participation Rates:	100%	100%	100%
Change since Spring 2021: <i>(percentage points)</i>	0	0	0
Next Year Survey Participation Targets:	≥90.0%	≥90.0%	≥90.0%
Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.			
The participation rate for this year, 2021-2022, is the same as last year. We were able to reach 100% of our families, students, and staff members to fill out the survey. This year, like last year, we mainly pushed the digital survey to our families. After the first push, we were able to get most of our students and staff members to finish their surveys. However, for the families, we started at a low percentage, in the 20s', and therefore other steps were necessary to increase our family participation survey rate. Mostly, we had to give phone calls to parents to remind parents to do their survey and during this time, we had to re-send the survey link or give their access codes to do their survey. In the end, we were able to reach all families and receive 100% participation from all of our families.			

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	91%	100%	92%
Spring 2021 Overall Satisfaction Rates:	90%	100%	92%
Change since Spring 2021: <i>(percentage points)</i>	+1	0	0
Next Year Overall Satisfaction Targets:	≥90.0%	≥90.0%	≥90.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

The overall satisfaction rate from last year to this year was very minimal or non-existent. We show that we have had an increase of satisfaction from the student by 1%. The other two categories, families and staff, showed no change.

From students some keywords that described what they liked about our school were: Friends, staff, events, and teachers.

From families some keywords that described what they liked about our school were: Teachers, small school, and staff.

From staff some keywords that described what they liked about our school were: Small school, staff, and that it is family oriented.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	85%	80th-99th percentile	-2
Knowledge and Fairness of Discipline, Rules and Norms	77%	80th-99th percentile	-4
Safety	75%	60th-79th percentile	+6
Sense of Belonging (School Connectedness)	65%	60th-79th percentile	-6

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	100%	80th-99th percentile	+1

Knowledge and Fairness of Discipline, Rules and Norms	98%	80th-99th percentile	-1
Safety	96%	80th-99th percentile	-3
Sense of Belonging (School Connectedness)	100%	80th-99th percentile	+1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	96%	60th-79th percentile	0
Knowledge and Fairness of Discipline, Rules and Norms	99%	80th-99th percentile	+7
Safety	93%	80th-99th percentile	0
Sense of Belonging (School Connectedness)	97%	80th-99th percentile	+7

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	77%	99%	97%
Spring 2021 Average Approval Rates:	79%	99%	93%
Change since Spring 2021: (percentage points)	-2	0	+4
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

Students: For each category, there was a drop in a few points. However, in safety, we increased by 6 points. I thought that was interesting because it shows that the school is a safer place than when we were doing distance learning, when they were home. The other categories may have had a drop

Families: On the other hand, for families, safety dropped a few points, while the other categories remained + or - 1 point from the previous year.

Staff: For our staff, we have seen an increase of 7 points for sense of belonging and knowledge of rules, discipline...etc. The other two categories remain the same from last year to this year.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Students: This year, the survey revealed that students have a much greater sense of safety within the school. The data showed an increase in 7 percentile points from the previous year in this category, one of our greatest improvements within the entire survey data set.

Families: One of our more proud moments within the survey came from the family responses with regard to two topics: Climate of support and sense of belonging. Each of these topics was rated at 100% favorable responses, and both saw a 1 point increase from the last year. This is notable success for us after having moved to a new location this year. Our staff has shown a drive and passion to reach the families within the school community. We attribute much of this to our office staff and especially the PACE coordinator position that we brought on. We have also done well to include families in the decision making at the school and will continue to do so with SSC meetings, Coffee with the Principal, surveys, and conferences.

Staff: Another notable success within the survey data was how well the staff responded to two topics: knowledge and fairness of rules, discipline, and norms as well as sense of belonging. The favorable response rate for these are at 99% and 97%, respectively. Our staff is heavily involved in the operations of the school and remains very cohesive and collaborative about its operation. We will continue to empower staff with coordinator positions when applicable, offer collaboration and professional development time regularly, Have one on one meetings to offer feedback and hear feedback, and accommodate their classroom needs as much as possible. We are extremely proud of our small school staff and how each one of them contribute to the success of each other and the students.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Climate of Support and Academic Learning: This topic saw a small discrepancy among the three partner groups. Where the students answered their survey items 85% favorably, which was a small drop from the previous year. Families answered 100% favorably and staff were at 96%. After looking deeper into the survey data, we saw that within this topic, nearly 20% of students selected the neutral responses that were available, choosing to neither agree or disagree. In any case, this is a growing point for us to focus on. As we discuss survey data in the near future, we will use these topics and questions to collaborate on ways to improve.

Knowledge and Fairness of Rules and Discipline: While staff members favorably answered these questions, students saw a 4 percent drop in approval ratings and families a 1% drop. The discrepancy here, we believe, is that while parents and staff tend to agree on the policies in place, the students may not. Within the survey question, the least favorable answered question by students was with regard to student treatment of teachers, meaning that students identified a problem with other students, not with the rules or policies in place. Beyond that, student answered least favorably when it came to the fairness of rules and fair treatment should a rule be broken. This data leads us to believe that there should be an emphasis on a) communicating procedures, rules, and consequences more clearly to the student on a regular basis and making sure that when implemented, consequences follow exactly what had already been communicated and prescribed.

Safety: The discrepancy in safety related items is that students answered the most favorably, and the families answered the least favorably. When we look at the free responses, we find that many families were concerned about a homeless encampment near the school entrance, and we believe this is why families had a less favorable response rate. Ironically, this encampment was cleared the day that the survey window closed. Being that students did only answer 75% favorable in this category, we believe that additional focus needs to be made on SEL related curriculum to teach the skill necessary for students to communicate and gather with less chance for emotional damage.

Sense of Belonging: Our largest discrepancy in the data set comes from within this category. While staff and

families answered quite favorably and saw an increase in favorable responses, students saw a 6 point reduction from last year's data. As we dove further, we found that again, many students were choosing a neutral response in the questions for this category. The least favorably answered question here was "I am happy to be at this school." I believe that as we continue to develop our SEL activities, incentives for good behavior, student recognition, and extracurriculars, we will see an increase in favorable responses.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

The most notable positive aspect of the survey results came within the free responses about what stakeholders like most about the school. Across all three groups, the connectedness, family atmosphere, level of support, and level of care exhibited by staff are heavily agreed upon. We are very proud of this because we feel that this foundational characteristic of care lends itself to a stronger school culture. We believe that this characteristic is among the highest selling points of our school. Many parents that come to enroll a student will cite that they have heard about how caring and family-oriented we are at MSA 6. Continuing to collaborate and meet with stakeholders on a regular basis communicating with them in a timely manner will help further solidify what we are doing well here.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Students: The most common responses in the student population involve a dislike for the school uniform and a dislike for one of the teaching staff. The uniform remains a consistent dislike for years. We have done well to incentivise the proper uniform in the beginning of the year and will now have to refocus some PBIS effort into this again. We are considering banning hoodies in general and coming up with a way to give students hoodless sweaters. With regard to the teacher in question, we will continue to meet and discuss areas of growth. We will evaluate this teacher and provide professional development and coaching if necessary. We would like to also increase the number of clubs/sports teams as our student enrollment increases and our staff size increases. Having a music program was also mentioned in the free responses. This could be done through our after school clubs as long as we have the capacity or a staff member who has the skill set for this club. In addition to this, this specific teacher has been helping our school by covering the vacant position from the first day of the 2nd semester and that this additional assignment/coverage has been stretching her thin regarding her assignment(s).

Staff: Staff patterns indicated a common dislike for two items: the co-location with Pio Pico middle school and the logistical troubles involved, as well as a struggle with the SPED coordinator. Our relationship with Pio Pico continues to grow and remain positive, however, we need to continue to work out internet access issues that come with the LAUSD firewall and work on mutual planning of drills and school events so that there are no surprises. Regarding our SPED coordinator we would like to continue to meet and collaborate between the SPED department and school staff to determine how best they can serve each other. Initially, the SPED coordinator position was unclear and caused confusion in the school. But recently (after the survey window) this position changed in a positive direction because the SPED coordinator will not be on site each day. Prior to this, we only had this staff on site 3x per week and shared with MSA 4. Lastly, the uncertainty of MSA-6's future has also been recognized as one area of growth. Since the move from last year to this year, which impacted our enrollment by half, since finding out that Pio Pico will shutter their doors in a few years, our staff has shown concern for the school.

Families: The two common dislikes for the school were a) the commute that former Palms students have to make to the Pio Pico location and b) the homeless encampment outside of the school. We offer a bus service from a pick-up location very near the old school site, and many students are able to use it. However, should a student want to stay at school for clubs and activities, their parents have to commute to pick them up, and this is not doable for most. We are gaining more and more students to be enrolled next year, and since they are much closer, hopefully we do not see this complaint come up as much. The homeless encampment that was making families uncomfortable has been cleared away (the week after the survey closed) and the city is monitoring the area to see if there is a resurgence.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type:

student, family, staff? Are there any patterns?

Students: What the students would like to suggest are very similar to what they had said about what they least liked about the school. That being the hoodies/uniforms, the math teacher, and food. Students have expressed that they would like to be able to wear their hoodies whenever they want, outside of class and inside classes as well, although we have told them that this was a safety issue and that it is a part of the school rules. The other suggestion was about the math teacher. Again, this was expressed in the least liked things about our school, but we want to thank this teacher for stepping up for helping out with the vacant position that we have had since the 2nd semester. We have been actively trying to find applicants who can fill our vacant positions (Linkedin, Paycom, Edjoin, events that Barbara has created...etc), but we have yet to find a candidate. Our last suggestion was to improve our food. We currently work with Better4You meals. But since the beginning, we have always tried to improve our food services. We have gone from Royal Dining, Revolution Foods, Lunch Master, to our current food provider, Better 4 You meals. Throughout the food vendor changes, we have asked our students to come and taste which food they like better. From student input, teachers, and families, we will make the decision to either change food providers or not.

Staff: The staff did not have a single most common suggestion for improvement. Among the suggestions we saw, there was a request for a new RSP teacher that can better accommodate the student in the classroom, a suggestion that we occupy a campus of our own, and sharper policies for behavior and consequences. Our SPED coordinator continues to evolve and meet the needs of the students and teachers on the campus. Recently, this staff member transitioned from a shared residence between MSA 4 and 6 to a full residency at MSA 6. We believe that as time goes on, this position will further evolve to fit the unique culture of our school and that it is indeed beneficial that this position will remain on site more often. We understand that a stand alone site is not necessarily a choice we get to make, but we look forward to a time when we can occupy a space of our own. Home office is working with LAUSD to modify our Prop 39 agreement to best suit our needs until a stand-alone site is developed.

Families: The families of MSA 6 felt first that MSA 6 should offer more extracurricular activity. Be it sports, clubs, or STEAM based activity, parents see the gap that we have when it comes to offering these things. The crossroads we are at is with staffing these things, and so we will have to make a greater push for parent team volunteers to spearhead these programs and find funding for transportation for kids that have to take the bus back to the Palms side of town.

Families have expressed that the meetings that we have are a little on the lengthy side. This is due to the translation that is being done from slide to slide. Families have suggested that separate meetings be done in order to cut the time of these meetings. What sometimes goes long is the "question and answers" that is done at the end of the meetings which may or may not pertain to all of our parents. We are currently discussing ways to make our meetings shorter, concise, and to the point.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

MSA 6 will first and foremost continue to seek enrollment for school growth, because an increase in student population will open up more funding and opportunities for extracurricular activities. We have a very small staff that is quite heavily occupied with their standard duties, coordinator roles, professional development, and school operations. As we develop a stronger presence in the Mid City community, we will begin to have parent volunteers that can lead extracurricular activities. We will need more space for these things as well, so we will rely on the Home office to find an open door to more.

Next, we will continue to work alongside our SPED coordinator through the rest of the year as they transition to a full residency at MSA 6. The ability to collaborate with staff and faculty can be improved as the SPED coordinator is more present throughout each day, especially in the classroom. We will facilitate more meetings between the SPED department and the staff to encourage a more cohesive environment for both. Beginning of next school year, we would like to also sit down with our SPED department and make sure that we have a list of items that we would like for our SPED team to work on throughout the school year.

For next year, the uniform issue will be addressed by giving away crew neck sweaters, instead of the usual sweaters with hoodies. This should cut down on the amount of hoodies that are worn on campus, which should lead to less issues with hoodies being on in classes and out of classes. Crew neck sweaters are being placed as of April 2022 for the following year, along with other uniform clothes such as the PE shorts, and PE shirt.

Regarding the math teacher suggestion, we will continuously look for a candidate through all of our hiring channels, LinkedIn, Edjoin, Paycom...etc. We will also monitor the classes by having check-ins with the covering teacher to assist in any way possible. Lastly, although there were lots of thoughts and suggestions about the math teacher, we are confident that the teacher is teaching the standards/content to the kids and getting them ready for their next grade level and for the state test.

MAGNOLIA SCIENCE ACADEMY - 7

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	97.2%	51.7%	90.9%
Spring 2021 Survey Participation Rates:	92.3%	65.4%	100%
Change since Spring 2021: <i>(percentage points)</i>	+4.9	-13.7	-9.1
Next Year Survey Participation Targets:	≥90.0%	≥80.0%	≥90.0%

Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.

We increased our participation rate for our students from 92.3% to 97.2%. The teachers did a good job administering the survey in class and supporting students with the process. The students who ended up not completing the survey were our 5th grade Independent Study students and the teacher reached out multiple times to the parents and students to complete it but they didn't. We dropped our participation rate for our staff and family surveys. Our staff showed a decrease of 9.7%, resulting in 90.9% participation. This decrease was a result of a couple things. First, two of the staff members who didn't complete it are two of our three custodians. They were both reminded multiple times to complete it but are not comfortable with using computers and didn't want to take time from their busy days to complete it. We offered support but they declined. The third staff member is new to our school this semester and said he didn't feel like he had been here long enough to complete a survey fairly. For the 13.7% decrease in participation of our families, we believe it is due to a few factors. One being that they still prefer the paper survey over the online one. Another reason is we discovered that families with multiple students enrolled were having to complete a survey per child rather than one per family which resulted in several just choosing to opt out or only complete one leaving them with an incomplete status. Lastly, we have worked hard the past couple of years to get our parents used to using Parent Square to communicate with us as well as access important school documents. The fact that this survey goes out via personal email caused a lot of confusion and left many parents unaware of the survey because they don't check their email regularly. We did send multiple reminders via Parent Square with directions for accessing the survey, ran a raffle for prizes for parents and their children, and had a station set up daily during morning drop off with ipads and staff support to help parents complete the survey. This helped increase our rate from about 12% to the 51% we ended up with.

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	88%	98%	90%
Spring 2021 Overall Satisfaction Rates:	87%	100%	97%
Change since Spring 2021: <i>(percentage points)</i>	+1.0	-2.0	-7.0
Next Year Overall Satisfaction Targets:	≥90.0%	≥90.0%	≥90.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

We met our school wide goal of 90% overall satisfaction rates for all stakeholder groups, except students, which we missed by 2%. Comparing Spring 2021 and Spring 2022, there was a 1% increase for student's satisfaction, a 2% decrease for families, and a 7% decrease for staff members. We believe the slight increase for the students is due to them being back at school but school still looked very different for them this year so that's probably why it wasn't higher. The parent overall satisfaction rate is average and has fluctuated between 98% and 100% over the years. I know many of them felt disconnected this year since COVID protocols made it difficult for in-person gatherings. Although we are disappointed in the 7% decrease in the overall satisfaction rate from staff, we are not surprised, especially after reading the free response comments. This has been an extremely difficult and challenging year for educators and as hard as everyone is working, important things were ignored or neglected in order to address other things.

Students:

- What I like best about the school is that the teachers are amazing and they help you when you need them their nice and caring to all the children
- Everything MSA7 is the best school in my opinion
- The food and the cafeteria too loud

Parents:

- Teachers and all staff are exceptional, there is parent involvement, they have build a positive school culture, they acknowledge personal achievement and good behavior of the students . WE LOVE MSA7!!!
- I'm so pleased with my choice in enrolling my child into this school. He use to struggle with reading and writing and ever since being apart of Magnolia Science Academy 7 he is now thriving. This school has helped my child in so many ways and I'm beyond grateful for each and every staff member. Team work has paid off! Thanks to our school for helping my second grader enthusiastically ready for school every morning! Magnolia

has kept learning fun all while being challenging enough to meet every one of his curricular needs met. I love this school!

- No before school program at 7am for working parents to leave their kids

Staff:

- I love the community that has been formed by MSA 7. My coworkers and admin are supportive, helpful, and genuinely care about one another. I also love the medical insurance we have, it has been extremely helpful for my medical needs.
- The diversity and support from all staff.
- Limited space for support staff to work and provide services to students.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	80%	20th-39th percentile	no change
Knowledge and Fairness of Discipline, Rules and Norms	78%	20th-39th percentile	- 6
Safety	71%	80th-99th percentile	- 3
Sense of Belonging (School Connectedness)	79%	40th-59th percentile	- 2

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	97%	80th-99th percentile	- 3
Knowledge and Fairness of Discipline, Rules and Norms	97%	80th-99th percentile	- 6
Safety	99%	80th-99th percentile	- 1
Sense of Belonging (School Connectedness)	98%	80th-99th percentile	- 2

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	98%	80th-99th percentile	+ 1
Knowledge and Fairness of Discipline, Rules and Norms	97%	80th-99th percentile	no change
Safety	92%	80th-99th percentile	- 4
Sense of Belonging (School Connectedness)	83%	40th-59th percentile	- 13

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	77.0%	98.0%	93.0%
Spring 2021 Average Approval Rates:	81.0%	99.0%	97.0%
Change since Spring 2021: (percentage points)	- 4.0	-1.0	- 4.0
Next Year Average Approval Targets:	≥80.0%	≥90.0%	≥90.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

The changes in average approval rates from Spring 2021 to Spring 2022 were disappointing for us to see, especially after a year of increases and growth in 2020-21. The average approval rating was down this year in all categories for all educational partner groups except:

- Students - Climate of Support for Academic Learning - stayed the same at 80%
- Staff - Climate of Support for Academic Learning - up 1 point from 97% to 98%
- Staff - Knowledge and Fairness of Discipline, Rules and Norms - stayed the same at 97%

The biggest change that occurred from last school year to this year was a decline of 13 points for staff's approval rating in the area of Sense of Belonging (School Connectedness) from 96% in 2020-21 to 83% in 2021-22. This has been a difficult year for all and many of the things we used to do as a school staff were either canceled or looked different this year due to COVID protocols, time restraints, and lack of motivation and energy. Although we were back in person this year, we felt more disconnected in many ways than when we were in distance learning last year.

We also saw a decline in the overall average approval rate for all educational partners. The student average approval rate declined by 4 points from 81% to 77%, the family's decreased 1 point from 99% to 98%, and the staff average approval rate decreased by 4 points from 97% to 93%.

Although it was great to be back in person this year, that came with its own set of challenges and brought an unprecedented school year. Behavior, SEL, and mental health needs are on the rise for all educational partners and although everyone is truly doing their best to support one another, needs still present themselves daily. We are optimistic that as we transition out of the pandemic we will be able to improve school culture and morale in order to see our numbers rise again.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Strengths/Successes:

- Students approval rating for Climate of Support for Academic Learning remained at 80%, same as last year
- Staff approval rating for Climate of Support for Academic Learning increased by 1 point from 97% to 98%
- Staff approval rating for Knowledge and Fairness of Discipline, Rules and Norms stayed the same at 97%

Highest Approval Rates:

The topic with the highest approval rates for all three educational partner groups was Climate of Support for Academic Learning. We were grateful to see that all educational partners had high approval ratings for this category knowing what a challenging year this was for all and that we worked hard as a community to support one

another and promote student learning as we transitioned back to an in person setting.

Most Proud:

We are most proud that all our educational partners approve positively of our Climate of Support for Academic Learning. We take great pride in the amount of academic and SEL support that is given to all of our students and have worked hard during this unprecedented year to transition our programs to meet the needs of our community during a pandemic and as we begin to transition out of a pandemic. We were also very proud to see that the parent approval rating of Safety was 99%. Although this was a 1 point decline from last year, it is still very high. Considering how much had to be done and focused on in regard to health and safety this year and the fact that only six families chose to keep their students in Independent Study, we are relieved to see that our families felt safe sending their children to school with us during this stressful and unsure year.

Maintain or Build Upon:

We will continue to build upon this climate of support by having meaningful reflection conversations with staff in order to get a clear and true understanding of how we can best support our students with not only learning loss but behavior, SEL, and mental health as we continue to transition out of a pandemic.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

-Climate of Support for Academic Learning:

Although the student approval rating for this topic stayed the same, it was the lowest of the three stakeholder groups (80%). We were pleased to see there wasn't a decline but feel the rating would have been higher if we had been able to bring our students back to the in person learning they were used to prior to the pandemic. There were still multiple health and safety protocols in place that made it difficult to fully support our students this year. We also feel they struggled with understanding what some of the questions were asking.

-Knowledge and Fairness of Discipline, Rules and Norms:

Although this was an area of concern for the free responses comments, the approval ratings were still rather high for all educational partner groups for this topic despite a 6 point decrease by students and families. We are also aware that this is an area of need as we have seen an increase in the amount and type of behaviors from our

students this year.

-Safety:

There was a decline in approval ratings this year for all three educational groups. They weren't significant, 3 points for students, 1 point for families, and 4 points for staff, but still something we need to be aware of and address. We know that coming back to in person learning in the middle of a worldwide pandemic made many people feel anxious about their health and safety. We also are aware that there have been a few unusual incidents this school year that could affect the members of our community feeling safe while at school. We are working to address these and hope to avoid further incidents in the future.

-Sense of Belonging (School Connectedness):

We saw a decrease in approval rates in this area by all three educational partner groups. Students and families decreased by 2 points and staff more significantly by 13 points. We saw quite a big increase in this area last year despite being apart in distance learning so it was quite hard for us to see a decline upon our return to in person instruction. Although difficult to see, it's not surprising. During distance learning our team worked hard to engage and connect with one another, our students, families, and each other and I believe the rates attested to that. This year, we worked hard to stay healthy, stay open and address the many needs of our students. SEL and connectedness was a priority for the students but not as much for our staff. We also weren't able to have many of the events and gatherings we're used to having which attributed to this decline.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

- Teachers and staff are helpful, respectful, and caring
- Communication and support
- Families witness safety and well being of students
- Tight-knit school community for staff
- Administrative support and responsiveness
- Diversity of staff

Patterns:

All educational partners mentioned how the school feels like a tight-knit community and family and how teachers and staff are helpful and caring. An inclusive, diverse and quality educational and work environment was also discussed multiple times.

Most Proud:

We are most proud of the high number of free responses that highlighted our staff members and team. Repeatedly educational partners talked about our hard working staff, supportive community, and family-feel environment.

Maintain or Build Upon:

Continue to focus on and build school culture for all educational partners as we transition out of the pandemic and back into a more normal setting where we can host events, have in-person meetings, and focus on things other than health and safety compliance.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

- Food Quality
- Recess and Lunch (cafeteria) Procedures
- Strengthen PBIS implementation, strategies, and structures
- Lack of before school program
- Limited space for support providers to use
- Increase parent involvement at school
- Improve school culture and community cohesiveness

Patterns:

All educational partners mentioned how the facility needs more space for staff and students as well as upgrades. All three groups mentioned that recess and lunch procedures need to be revised as well as the need for better food

quality in the cafeteria.

Areas Needing Close Attention:

The two areas needing close attention are strengthening PBIS implementation, strategies, and structures and improving school culture and community cohesiveness

Gaps:

Providing a morning care program before school so parents can drop students off earlier.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

- Improve the quality of the cafeteria food
- Before school program for working parents
- Less PD and more prep time in the classroom.
- More space - space for small group instruction, SPED, storage, etc.
- Staff wellness activities

Patterns:

All stakeholders mentioned how the facility needs improvements and growth. Two of the three groups mentioned a need to improve food quality. Staff asked for more time and wellness activities. Parents asked for a before school program.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

- By July 2022, MSA 7 will implement a before-school program with educational partners. We will look into running our own program or outsourcing to are using the ELOP funds.
- Collaborate with Schools in Action to identify a new vendor or course of action to increase the food quality by June 30, 2022. SIA is putting a corrective action plan in place to address concerns.
- Recess and lunch procedures will be revisited to implement post-pandemic protocols - this is currently happening and will be finalized by the start of 2022-23 school year.
- Collaborate with the PBIS team to reflect glows and grows for this school year. Focus on future implementation of promising practices per survey responses. We need to assign a new PBIS Coach as ours is

leaving to accept a new position. This will be addressed April 2022.

- Continue working on expansion plans for more space by end of 2021-22 school year
- Increase parent involvement. Work with the PACE Coordinator to create an action plan to re-engage families to acceptable levels per educational partner survey. This will be ready to launch in August 2022.

Although it is important to acknowledge and take all suggestions into consideration, we have chosen six that we would like to put the most focus and attention into. These six were selected due to the number of times they were mentioned in the surveys, them being a concern for us as well, and our ability to actually implement change.

MAGNOLIA SCIENCE ACADEMY - BELL

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	100%	54.3%	100%
Spring 2021 Survey Participation Rates:	94%	41.5%	100%
Change since Spring 2021: <i>(percentage points)</i>	+6.0	+12.8	0
Next Year Survey Participation Targets:	≥95.0%	≥60.0%	= 100%
Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.			
All staff took the survey and we achieved 100%. All students took the survey and reached 100%. The family survey was a lot more challenging to get completed because our families are used to paper copies and in the past they were not required to complete the survey only and with a unique code. However, making individual calls and personalized emails was most helpful.			

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	86%	96%	93%
Spring 2021 Overall Satisfaction Rates:	88%	99%	98%
Change since Spring 2021: <i>(percentage points)</i>	-2.0	-3.0	-5.0
Next Year Overall Satisfaction Targets:	≥85.0%	≥95.0%	≥90.0%
Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.			
The overall satisfaction rate from last year to this year decreased overall by -2% for students, -3% for Families, and			

-5% for staff. We show that we have had a decrease of satisfaction from all three stakeholders. However, the lowest rate of satisfaction is 88% followed by 98%, so in all reality it is not that bad. In addition, our satisfaction rate is above or equal to MPS.

From students some keywords that described what they liked about our school were: Friends, supportive staff, after school clubs, campus, and helpful teachers.

From families some keywords that described what they liked about our school were: Teachers, Admin support/expectations, high quality of instruction, staff, and counseling.

From staff some keywords that described what they liked about our school were: Support among staff and Friendly admin.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	83%	80th-99th percentile	-5
Knowledge and Fairness of Discipline, Rules and Norms	72%	60th-79th percentile	-10
Safety	69%	40th-59th percentile	-4
Sense of Belonging (School Connectedness)	62%	40th-59th percentile	-6

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	98%	80th-99th percentile	-1
Knowledge and Fairness of Discipline, Rules and Norms	93%	40th-59th percentile	-4
Safety	95%	60th-79th percentile	-3
Sense of Belonging (School Connectedness)	96%	80th-99th percentile	-1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	96%	60th-79th percentile	-1
Knowledge and Fairness of Discipline, Rules and Norms	82%	20th-39th percentile	-11
Safety	78%	40th-59th percentile	-2
Sense of Belonging (School Connectedness)	81%	40th-59th percentile	-2

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	72%	96%	84.0%
Spring 2021 Average Approval Rates:	79%	97%	92.0%
Change since Spring 2021: (percentage points)	-7.0	- 1.0	- 8.0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

Students: For each category, there was a drop in a few points. However, it is possible that due to the pandemic the points dropped coming back to school after being at home since March 2021. However, safety and knowledge of fairness and norms were the two highest declines. This data is evidence that the pandemic has increased a gap in confusion about school norms and we have a responsibility to over communicate and reinforce our students' knowledge of the school systems. Furthermore, our focus on PBIS will allow us to also acknowledge the correct behaviors and to reward growth and improvement. Sense of belonging was also low for students and it dropped 6 points from the previous survey.

Families: All of the sub categories dropped for families too. However, safety and knowledge of discipline and rules had declined from previous surveys. Social media has made one or two incidents appear as if a school is unsafe and being co-located with two other schools has exponentially affected this perception.

Staff: Just like students and families, there were declines in all topics for staff. Knowledge and Fairness of Discipline, Rules and Norms was the lowest score with a decline of 11 points from the previous survey. This shows that the leadership needs to improve this area for all stakeholders.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Although we saw a decline in approval rate the rates for students and staff continue to be higher or similar to the MPS average. Historically our lowest score for students has been 68% and our highest 79%. The students want to feel like they have a voice and this is a priority for us moving forward. The approval rate for families remained the same, and this is probably because they like our strict rules and feel that students are being supported by their teachers and staff alike. In addition, parents feel that our school's standards are high and it's a welcoming environment. Historically, the staff approval rate has been under 90%, as low as 78% and as high as 92%. However, this year shows a decline to 84% and we understand that a lot of this has to do with the additional tasks that have accompanied reopening a school after a pandemic.

- School community, feeling of safety, welcoming environment
- High quality of standards (Spanish)
- Support among staff
- After School clubs, tutoring and support, Saturday school

- Friendly admin/staff

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Students: The most common responses in the student population involve a dislike for the school uniform and a dislike for one of the teaching staff. The uniform remains a consistent dislike for years along with too much homework.

- Perception of inconsistent treatment and enforcement of rules by each teacher, whole class consequences instead of consequences for the students who are not following rules
- Too much homework (described as excessive amounts) *
- Some bullying/ racist comments*
- Uniform policy is too strict*
- Quality of school lunches

*Similar to other years

Staff: The staff seems to really dislike the discipline process and need clarity about the different roles and their assigned tasks. Furthermore, the staff also would like to see an improvement in communication.

- Lack of follow through on discipline
- Role confusion- unclear which responsibilities belong to which person; more work keeps being added to teacher’s plate
- Leadership instability and communication

Families: Families would like to see a high school option for their students beyond our 8th grade! Families are concerned about the safety of the neighborhood and would like to see more curriculum that teaches and aligns with their students’ heritage.

- Only offers up to grade 8 would like a Magnolia High School Option

- Teacher turn over
- Do not teach about “my child’s” heritage
- Receiving English messages on parent square only (Spanish)
- Some staff are unfriendly with families and students
- Unsafe neighborhood
- Supervision

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

The most notable positive aspect of the survey results came within the free responses about what stakeholders like most about the school. Across all three groups, the connectedness, family atmosphere, level of support, and level of care exhibited by staff are heavily agreed upon. We are very proud of this because we feel that this foundational characteristic of care lends itself to a stronger school culture. We believe that this characteristic is among the highest selling points of our school.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

The school needs to improve communication across all stakeholders so that there is a better understanding of the

roles and expectations at all levels. Furthermore, there needs to be a greater emphasis on student leadership, so that students' voices are heard and they have a stronger sense of belonging at MSA Bell. For families, we need to share all the wonderful activities happening everyday and give them an insight as to how safe our school is, so that social media is not their main source. After a Principal transition, there are some areas that need some adjustments to improve and continue to build on the trust and collaboration amongst staff.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Students

- Fair and consistent treatment of students, enforcement of rules equally across the school
- Reduce amount of homework
- Later start time for school- 8:30 am
- Relax the dress code, allow more options for pants and shoes
- Provide a student store like the other schools on campus/ vending machines

Families

- Updated information IEP/ 504
- More strict with rules and safety
- Stop closing the restrooms and limiting access for students
- Make the street a one way street for traffic
- Hire more staff for supervision, consistent
- Participation in social activities, giving back to the community

Staff

- Clearly define roles and responsibilities for all positions
- Have security
- Admin team needs to be more unified and have clearer communication. Everyone seems to be confused on a lot of things

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

- Teach our students why uniforms are important. The staff will use the summer time to prepare a cohesive plan for teaching students at the beginning of the year why uniforms are important and the benefits that it has on students and the school community.
- Work with History, elective teachers, and other staff to bring awareness to diverse cultures that are embedded in the lesson plans.
- Continuing to build on the supervision map that has been created to improve our supervision during unstructured times (break, lunch). Cones are being used to create boundaries for our students. Ensure that weekly supervision huddles are implemented to facilitate communication on needs.
- Teacher turnover: Continue to improve teacher relationships and work with HR to make the working conditions at MSA Bell competitive while making teachers' SEL a priority.
- Revisit organization chart with the entire staff, some changes have been made that are different from that of the start of the school year, perhaps they need a review

MAGNOLIA SCIENCE ACADEMY - SANTA ANA

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

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- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	97.8%	81.8%	100%
Spring 2021 Survey Participation Rates:	95.3%	72.8%	100%
Change since Spring 2021: <i>(percentage points)</i>	+2.5	+9.0	0
Next Year Survey Participation Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.

MSASA’s observation on participation rates for our students is that there is a 2.5% increase from the 2020-2021 school year. Though we are pleased with this increase and exceeding the MPS targeted goal of greater than 80%, our students' absenteeism is still a concern post pandemic as we have a growing number of short term independent studies due to illness.

For our families, MPS targets are set at 80% and at MSASA we are proud of our family participation rate at 81.8%. Last year our participation rate was 72.8% and we are extremely proud of this 9% increase. We attribute the success of our PACE coordinator, Ms. Maricruz, in attaining such a high participation rate. This year our focus has been on communication with all our educational partners, more specifically highlighting our weekly Coffee With the Principals so that families’ voices are heard and valued.

For our Staff we are pleased that for the past two years, we have a 100% survey participation rate. We are pleased to note that all staff at MSASA, regardless of classified or certified staff - all voices are heard.

Overall Satisfaction Rates:

This rate measures our educational partners’ overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students /**

parents / educators."

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	75.0%	94.0%	91.0%
Spring 2021 Overall Satisfaction Rates:	84.0%	98.0%	78.0%
Change since Spring 2021: <i>(percentage points)</i>	-11.0	-4.0	+13.0
Next Year Overall Satisfaction Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

For our students, it is noted that our satisfaction rates have had a decrease as they are currently at 75%, thus a decrease of 11% from our previous year. What we have noted is that our students are satisfied and pleased with our teachers, playground/ gym, sports programs, and our STEAM integration across TK-12 grades. Students have noted their distaste for our food service and are concerned with the lack of field space and no grass. In addition, our students are concerned with bullying.

Our families at MSASA are at 94% satisfaction rate. This is a decline of 4%, as last year was noted at 98%. Our families have pointed out that rules are not consistent across TK-12 grades. There is a lack of music integration across MSASA. They have noted that there is a lack of supervision during the recesses and lunches. They have expressed concern with our front office that phone calls are not often answered. Our families are extremely satisfied with our teacher and academics. They are pleased with communication, support staff, and the personal attention to our students.

For our Staff at MSASA, we are pleased to highlight a gain of 14% for the satisfaction rates. This year the teachers are pleased with the overall welcoming culture, support from admin, and academic freedoms in classrooms. Our staff has noted that they would like more parent participation and more consistent discipline with consequences. A major area to support noted by staff is our SPED department and the lack of SPED support in the classrooms.

Average Approval Rates:Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	78%	20th-39th percentile	-3
Knowledge and Fairness of Discipline, Rules and Norms	67%	40th-59th percentile	-10
Safety	71%	20th-39th percentile	-1
Sense of Belonging (School Connectedness)	64%	40th-59th percentile	-5

Family Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	96%	20th-39th percentile	0
Knowledge and Fairness of Discipline, Rules and Norms	92%	40th-59th percentile	-3
Safety	88%	20th-39th percentile	-1
Sense of Belonging (School Connectedness)	95%	40th-59th percentile	-2

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	95%	20th-39th percentile	+4
Knowledge and Fairness of Discipline, Rules and Norms	89%	40th-59th percentile	+4
Safety	80%	20th-39th percentile	-3
Sense of Belonging (School Connectedness)	86%	40th-59th percentile	+8

Average approval rate measures our educational partners’ average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	70.0%	94.0%	88.0%
Spring 2021 Average Approval Rates:	76.0%	96.0%	84.0%
Change since Spring 2021: <i>(percentage points)</i>	-6.0	-2.0	+4.0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:
Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?
<p>Students:</p> <p>MSASA students’ approval rating has declined 6% from last year. In regards to “Climate of Support in Academic Learning” for our students, MSASA has provided after school tutoring and intervention groups. We are experiencing a sub shortage, thus students may not feel comfortable in seeking support for their core academics. In secondary we have two long term subs and it is difficult for them to commit to longer hours. For topic two: “Knowledge and Fairness of Discipline,” we have declined 10%. We attribute this to our transition back to in school learning and many students have found it challenging to transition from online learning, hybrid to fully in school. For topic 4: “Sense of Belonging,” our students have a decrease of 5%. This is due to the fact that our students need more SEL support as many have been experiencing school anxiety. This being said, we have a part time social worker on campus and have partnered with the Chicago School of Psychology to support our students individually and in group settings.</p> <p>Families:</p> <p>MSASA families responses to “Knowledge and Fairness of Discipline” has declined 3% from the previous year. Our families are seeing many students struggling with adult-like addictions stemming from the pandemic. We have installed vape detectors in all secondary bathrooms and the secondary level is using e-hall passes to monitor and combat certain behaviors. It has been noted that families feel certain grade/student groups are not being treated</p>

equally.

Staff:

MSASA staff's "Sense of Belonging" has increased 8% from the previous year. This year we have made great effort in our communication with staff and open door policy. It is apparent that staff feel a part of our Magnolia Pirate family. There is a school-wide accessible calendar, we have a weekly "Hook" newsletter, as well as celebrating and highlighting our staff during our weekly meetings. We will note that Safety has declined by 3%. This is possibly due to Covid related concerns as well as a need for proper fencing to ensure a closed and safe campus.

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Students: At MSASA the student approval rate is 70%. Our highest topic is Climate of Support for academic learning at 78%. Our students are taking advantage of tutoring at the secondary level. At the elementary level students have specialty pullouts like science, theater arts, arts, and PE to support a robust academic learning. We are most proud of this approval of 78% as our students are supported even after the school day is over with our after school ASES, sports, and academic support. We are looking to build our climate of academic support as we speak. We are in the process of hiring a music teacher for our ASES program and next year we aim to incorporate music during the learning day as a speciality pullout.

Family: Our highest approval for families is the "Climate of Support for Academic Learning" at 96%. Parents feel that we at MSASA are providing their children with a robust academic extra curricular program. Another area of strength is the topic: "Sense of Belonging" as our families have a score of 95% approval. Our families feel we are communicating, and providing them with a weekly Coffee with the Principal in both Spanish and English. Parents have noted that our after school sports program has increased the student morale and increased grades throughout TK-12. Next year, our high schoolers will be able to participate in CIF sports and our families will be able to be more visible and present around campus as the covid restrictions are lifted.

Staff: Our highest staff approval rate is the "Climate of Support for Academic Learning" at 95%. Our staff is more involved with sports, after school clubs, and tutoring. Staff have many supplemental programs to assist and reinforce student mastery of learning. As we plan for next school year we will ensure that the teachers' voices are heard and valued as they are the master teachers and know their students' needs best. We aim to ensure an open and honest dialog with our staff, so that they are supported academically.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Students: Sense of Belonging 64% -5/ Knowledge and fairness of discipline rules and norms: 67% -10

MSASA students are having a difficult time adjusting back to full time daily instruction. Students have developed adult-like addictions from distance learning/hybrid settings from the previous year. Many students are dealing with social-emotional issues that require our school psychologist and now a part time special worker to support them. Many students are experiencing school anxiety and a lack of school structured environment, thus causing a decline for a sense of belonging.

Students' understanding of “Knowledge/Fairness of Discipline and Rules/Norms” declined 10%. We attribute this to the addition of a new Dean of Students and the culture that has been established for the positive. Students are adjusting slowly due to school being back in person and going full steam ahead. Students are finding it challenging to get back to school mode.

Families: Safety at 88% decline of -1.

MSA families lowest rating was Safety. After reviewing, families find the parking still a concern and are concerned with our school not being fully enclosed.

Staff: Safety at 80% -3

MSASA Staff are concerned with covid compliance in the sense that they are being exposed and are vulnerable to contracting covid. Staff would agree with the lack of parking situation. Staff also feel they need more support dealing with student misbehavior and discipline.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

Students

All students are so pleased with our teachers, playground, gym/sports, STEAM integration, and friends. We are pleased to have established a great environment of learning and extra curricular activities for our Pirate scholars.

STAFF

All are pleased with our welcoming culture, friendly staff, small class sizes and support from admin.

Families

Families are happy with our staff, all staff's dedication to our students, and communication regarding grades and well-being of children. Families are comforted that all staff recognize students by name and need.

Across all educational partners our TEACHERS are valued, respected, and appreciated. We are so pleased to have such a great staff this year. In order to maintain and build on the success of our teachers we need to ensure the best salaries and support for them.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

STUDENTS

FOOD across all grade levels has been a major concern. Students have expressed bullying and having to wear uniforms as what they like least.

STAFF

Staff have expressed a lack of parent participation, lack of proper discipline, and not enough SPED support.

FAMILIES

Families have expressed the need to have a more approachable/friendly office staff, and they would like to have a

music/art program. They are concerned that rules are not being followed by all students, and the lack of supervision during recess and lunch times.

Across all our educational partners, the least liked is the food served, bullying/supporting our students, school-wide expectations, supervision, grass area/parking, and ensuring our SPED team is being supported. MSASA needs to pay close attention to our food as it has been a constant concern on a yearly basis. We need to support our SPED team with more paras in classrooms as well as retaining our SPED team.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Students

At MSASA students would greatly like to see improvement with our food served. Students would appreciate maintaining our facilities as well as gym and play spaces. Students would like more variety of play equipment. Students would greatly appreciate transparency regarding rules and hold all students equally accountable.

STAFF

Staff suggestions include setting specific discipline consequences, salary improvement, better SPED support, and resources. Staff would like to have our facilities maintained.

FAMILIES

Families would like a stoplight or a "keep clear" signage on First St. They would also like a large sign to advertise the school as well as a marquee to display what is happening on campus. They would like more arts and music integration as well as an in person library. Families would also appreciate more staff that are bilingual.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

For MSASA our next steps will be to set up a food meeting with Better for You and Schools in Action in addition to involving students to choose vendors. We need to focus more and revisit Zones of Regulation and partnering with Dr. Jones with the Chicago School of Psychology/ internships and hosting small groups/ including Community Circles to ensure our students' voices and concerns are being addressed and that all feel part of our Magnolia Pirate family. We will prioritize our SPED, so that there is more focused time in hiring, training, and greater presence in the classrooms. We will also work on getting more training and support for our ASES supervision, radio supports/ restorative justice practices and community circles.

MAGNOLIA SCIENCE ACADEMY - SAN DIEGO

2021-22 EDUCATIONAL PARTNERS SURVEY REFLECTIONS

Introduction:

Educational partner voices, i.e., voices of our students, families, staff, and other school community members, play a powerful role in helping us learn how to improve our teaching, leadership, and other school practices. Surveys have been the primary means of collecting student, family, and staff voices about what we are doing great and should keep doing, and what areas for improvement are so we can continue to provide our students with the best quality education. MPS uses an online platform to provide students, families, and staff with groups of questions that measure their perceptions of teaching and learning, as well as their perceptions of school climate and safety. This feedback instrument provides teachers and school leaders with valuable data about how students see their classes, how much parents are involved, how supported staff feel and how to facilitate improvement.

Annual educational partner experience survey:

MPS uses the CORE DISTRICTS survey instrument developed by WestEd for the California Department of Education as our annual educational partner experience survey. The survey includes questions for school climate indicators which include the following four topics for students, families, and staff:

- Climate of Support for Academic Learning;
- Knowledge and Fairness of Discipline, Rules and Norms;
- Safety;
- Sense of Belonging (School Connectedness).

Some sample questions on the survey include:

- “This school is a supportive and inviting place for students to learn.”
- “All students are treated fairly when they break school rules.”
- “How safe do you feel when you are at school?”
- “I feel like I am part of this school.”

Student SEL survey:

Separate from the annual educational partner experience survey, our “students” also take the CORE DISTRICTS Social Emotional Learning (SEL) survey in the fall and spring. The SEL survey asks questions in additional four topics which include indicators for social-emotional competencies:

- Growth Mindset;
- Self-Efficacy;
- Self-Management;
- Social Awareness.

As part of our MTSS efforts, school leadership, teachers, and support staff analyze student SEL survey results in the fall to provide our students with targeted social-emotional support and then measure student responses again in the

spring to measure growth, identify greatest progress and needs in order to inform our next steps.

Note: This document is about our reflections on the annual educational partner experience survey results. Our reflections on the student SEL surveys are provided in a separate document.

Survey Participation Rates:

Survey Participation Rates	Student	Family	Staff
Spring 2022 Survey Participation Rates:	92.86%	71.1%	100%
Spring 2021 Survey Participation Rates:	94.7%	67.9%	100%
Change since Spring 2021: <i>(percentage points)</i>	-1.84	+3.2	0
Next Year Survey Participation Targets:	≥85.0%	≥65.0%	≥95%
Findings: What are your observations on the participation rates? Are there any changes from last year? If so, what might have caused changes in response rates? Compare email vs. paper response rates.			
<p>Students: The survey was administered in our history classes. We dropped nearly 2%, but we made our student participation target goal. One of the main reasons for this was students being absent due to COVID related circumstances.</p> <p>Families: We had a 3.2% increase in family participation rate this year. We think the reason for the increase in family participation was due to the text messages, weekly newsletter, and reminders at parent meetings.</p> <p>Staff: The staff was once again given time during two staff meetings to complete the survey. We feel like this strategy has helped us maintain the 100% participation rate.</p>			

Overall Satisfaction Rates:

This rate measures our educational partners' overall satisfaction with the school through their responses to the following question: "**Overall, I am satisfied and would recommend this school to other students / parents / educators.**"

Overall Satisfaction Rates	Student	Family	Staff
Spring 2022 Overall Satisfaction Rates:	78.0%	96.0%	100%
Spring 2021 Overall Satisfaction Rates:	89.0%	97.0%	100%
Change since Spring 2021: <i>(percentage points)</i>	-11.0	-1.0	0
Next Year Overall Satisfaction Targets:	≥80.0%	≥80.0%	≥80.0%

Findings: What are your observations on the overall satisfaction rates? Are there any changes from last year? If so, what might have caused changes in overall satisfaction rates? You may include quotes from the free-responses that would attest to educational partners' overall satisfaction.

Students: Our students indicated a 78% favorable rate for an overall school experience. This percent is comparable to the overall MPS favorable score of 78%. Last year, we had questions about our results during Distance Learning. We believe the significant increases might have been due to the environment change. As a result, we wanted to monitor our progress this year and compare it to 2019-20 results. When we compare the results for 2019-20 results, this year we have 78% compared to 80%.

Families: Our families recorded an overall satisfaction rate of 96% which is a 1 point increase from two years ago. Considering transitioning from almost a full year of distance learning to in-person education, our school receiving 96% overall satisfaction rate from our parents this year is quite remarkable.

Staff: Our staff continued to record an overall satisfaction rate of 100% this year which is equal to our score last year. We continue to hold weekly staff meetings and leadership meetings to hear staff feedback and help make decisions collaboratively.

Average Approval Rates:

Student Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	77%	60th-79th percentile	-5
Knowledge and Fairness of Discipline, Rules and Norms	65%	40th-59th percentile	-11
Safety	61%	20th-39th percentile	-14
Sense of Belonging (School Connectedness)	63%	60th-79th percentile	-2

Family Survey:

Topic	Percent	Compared to others	Change
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	Favorable	in the CORE Districts dataset	since Spring 2021 (percentage points)
Climate of Support for Academic Learning	97%	80th-99th percentile	+ 1
Knowledge and Fairness of Discipline, Rules and Norms	93%	40th-59th percentile	- 4
Safety	97%	80th-99th percentile	- 2
Sense of Belonging (School Connectedness)	96%	80th-99th percentile	- 1

Staff Survey:

Topic	Percent Favorable	Compared to others in the CORE Districts dataset	Change since Spring 2021 (percentage points)
Climate of Support for Academic Learning	100%	80-99th percentile	+ 3
Knowledge and Fairness of Discipline, Rules and Norms	90%	60-79th percentile	- 3
Safety	80%	40-59th percentile	- 14
Sense of Belonging (School Connectedness)	96%	80-99th percentile	- 3

Average approval rate measures our educational partners' average approval rating based on their responses to **ALL** questions with a rating.

Average Approval Rates	Student	Family	Staff
Spring 2022 Average Approval Rates:	66.0%	96.0%	100%
Spring 2021 Average Approval Rates:	76.0%	97.0%	100%
Change since Spring 2021: (percentage points)	- 10.0%	- 1.0	0
Next Year Average Approval Targets:	≥70.0%	≥80.0%	≥80.0%

Survey Findings:

The following are our findings based on the average approval rates and breakdown of our survey results, including our greatest progress and needs.

Findings Based on Average Approval Rates of Survey Topics/Questions:

Findings: What are your observations on the average approval rates? Are there any changes from last year? If so, what might have caused changes in average approval rates?

Students: In general, our student favorable rates have decreased from 2020-21. Our foundational Tier I systems of support from the past 3 years have carried over to this school year. However, two thirds of our student population (6th & 7th graders) have just been exposed to our school culture for the first time this school year due to the COVID landscape. This appears to have had an impact on our overall culture. This is evidenced by comparing our approval rates from two years ago. This data reveals a 6% increase in approval rating when two thirds of our student population has prior exposure to our school culture versus one third. We have continued to support our students' social-emotional well-being through weekly common SSR Zones Of Regulation lessons, as well as explicitly teaching students the values of our character education program- The WIZARD Way. In addition, we have had targeted assemblies to reinforce our school-wide behavior expectations both in the fall and spring, such as Internet Safety and Cyber Bullying through the San Diego Police Foundation and a partnership with the Sandy Hook Promise Organization to schedule their "Say Something" Assembly for all our students.

Families: The family approval rate indicated a solid 96% which is the same as two years ago. Our family approval rate is consistently high from year to year, and a 1% decrease from last school year is very insignificant given the fact that we returned to in person learning after almost a full year of distance learning. We have continued to engage our families through different school events throughout the year, ensuring they are valued educational partners in decision making through different outlets such as weekly Coffee with the Principal and bi-monthly Parent Task Force, SSC and ELAC meetings. This level of parent engagement and collaboration have yielded a high quality program that earned us a California Distinguished School title.

Staff: Our approval rate continued to remain at 100% this year with zero change from last year. We attribute this to our frequent staff meetings to collect feedback from our teachers and staff members as well as our Leadership meetings where we collaborate with teachers and include them in the decision making process. We also create camaraderie amongst our staff by celebrating birthdays, baby showers, staff lunches, etc..

Reflections: Successes

Write a description of successes and/or progress based on a review of the approval rates of survey topics/questions. (Considering the average approval rates for each topic, what strengths were visible in each survey type: student, family, staff? Which topics and questions have the highest approval rates? What are you most proud of? How do you plan to maintain or build upon that success?)

Students: (Safety) Compared to other MPS schools, our favorable rate is +4 points when we ask students- “I am happy to be at this school”. Compared to other MPS schools, our favorable rate is +5 points when we ask students- “I feel like I am part of this school”. Compared to other MPS schools, our favorable rate is +10 points when we ask students- “The teachers at this school treat students fairly” (three quarters of our students indicated a favorable rating). Compared to other MPS schools, our favorable rate is +6 when we ask students- “I feel safe in my school”.

(Knowledge and Fairness of Discipline, Rules and Norms) With the exception of one area, the majority of our students indicated that our school-wide expectations, rules and norms are clear and they have an understanding of them.

(Climate of Support for Academic Learning) 92% of our students agreed that our teachers allow them to have opportunities to take part in classroom discussions or activities.

Families: The topic with the highest approval rate was the Climate of Support for Academic Learning with a solid 97% favorable rating as reported by our families. We take great pride in the amount of academic and SEL support that we provide to all of our students. Free after school tutoring and a wide variety of clubs, competitive teams, Saturday School, Fall and Spring Student-led Conferences are all part of our strong academic program that our families appreciate. We will continue to support our students' academic and emotional growth.

Staff: Our staff rates their satisfaction with the school favorably compared to other MPS schools at 100% to their 90% satisfaction rate. Our staff's sense of belonging, climate of support and knowledge and fairness of discipline, rules and norm all rate about 90%. Specifically when asked “how many adults at this school support each other and treat each other with respect”, our staff responded 100% favorably. Our maintenance can be attributed to the planned effort in creating a sense of camaraderie through the value we place on open lines of communication, birthday and special celebrations, staff meeting shout-outs and recognitions, valuing our colleagues input, and providing varied opportunities for staff members to participate in shared leadership.

Reflections: Identified Needs

Write a description of any areas that need significant improvement based on a review of the approval rates of survey topics/questions, including any areas of low approval and significant gaps among responses of student groups, and any steps taken to address those areas. (Considering the average approval rates for each topic, what areas for improvement emerged? Which topics and questions have the lowest approval rates? What are areas that need your close attention? Are there any gaps, i.e., are there any topics or questions for which approval rate for any student group is below the “all students” approval rate? What steps is the school planning to take to address these areas with the greatest need for improvement?)

Students: Only 32% of our students indicated that our students treat teachers with respect. This is an area that will need to be addressed in our SSR classes through SEL lessons and other activities that focus on CASEL's SEL Framework of: Self Management, Self Awareness, Social Awareness, Responsible Decision Making and Relationship Skills.

Families: Knowledge and Fairness of Discipline Rules and Norms recorded the lowest rating among all topics with a 93%. This is the same rating we received 2 years ago. We will continue to hold assemblies for each grade level at the beginning of each school year so that students have a clear understanding of our discipline policy. An area of improvement would be to create opportunities for our parents to learn and understand our discipline policy, giving them the opportunity to ask questions. This could be done at monthly or bi-monthly workshops with a team from our admin and staff.

Staff: One area that dropped 14 points in our safety rating from the previous year during distance learning. While this score is equal to 2020 and higher than in the past, it is an area to focus on. Our staff rated disruptive student behavior as an area of concern (65% favorable). Due to the pandemic, we are seeing an increase in disruptive behavior and conflicts among students as they return to campus this year. We have added extra support this year to target these behaviors with our MTSS program, PEACE student group, Wizard Way Character Education program and restorative practices.

Free-Response Findings:

Along with the questions on the CORE survey instrument, MPS also asks educational partners to respond to the following three open-ended questions so that they can state their thoughts openly: What do you like best about your school? What do you like least about your school? What is one suggestion you would like to offer to improve your school?

The responses to the above questions help us identify our greatest progress, greatest needs, and ways to improve so that we can maintain and improve the educational quality of our schools on an ongoing basis.

Findings Based on Free-Response Questions:

WHAT DO YOU LIKE BEST ABOUT YOUR SCHOOL? (GLOWS)

Considering the free responses to this question, what strengths were visible in each survey type: student, family, staff? Are there any patterns? What are you most proud of based on the responses? How do you plan to maintain or build upon that success?

Students: There are 79 responses about friends at our school. A student best described Magnolia Science Academy San Diego as “It is genuinely a nice place for people to get friends”. Friendship at MSA San Diego is an important part of our student’s life on campus. 106 responses complimented our staff and teachers. Also, there are 34 responses that praised the “people” at our site.

Families: The top answer that our families indicated as liking best about our school is our teachers! They described them as “Great Teachers.” Specifically, they have described our teachers as being: friendly, caring, helpful, communicative, welcoming, inclusive, positive, skilled, fair, nurturing, team driven, amazing and having high academic standards. Families also like the enrichment opportunities that their children experience through their elective classes and by attending our after school clubs.

Staff: Our staff described our school as a welcoming and caring environment where there is a feeling of camaraderie with all. Staff liked the support, which includes social-emotional support, that they receive from both their colleagues and administration. They like the positive relationships that they have formed with one another. Staff reported that their voices are heard and they like the autonomy of being creative with their curriculum design and delivery. Lastly, they indicated that our wide variety of clubs, athletics and tutoring is a great way to connect with students.

WHAT DO YOU LIKE LEAST ABOUT YOUR SCHOOL? (GROWS)

Considering the free responses to this question, what areas for improvement emerged in each survey type: student, family, staff? Are there any patterns? What are areas that need your close attention? Are there any gaps, i.e., are there any areas that need to be improved for any student group?

Students: The top least liked response from our students is our school uniform policy. Another least liked is how some students interact with each other and with teachers, and how some teachers interact with students.

Families: Most of the competitive sports we offer to our students have been cancelled due to COVID this year. These types of extra curricular activities we offer are what draw families to our school and play a vital role in our students' social emotional learning and their connectedness to the school. A few of our families did not like these opportunities being unavailable to our students. This feedback came from 5 different families.

Staff: The top response from our staff is the limited space for some of our classes and PE. Lastly, staff members would like communication to improve, specifically in the area of discipline procedures. Also they would like to have access to more local stores for purchasing supplies.

WHAT IS ONE SUGGESTION YOU WOULD LIKE TO OFFER TO IMPROVE YOUR SCHOOL?

(SUGGESTIONS)

Considering the free responses to this question, what suggestions for improvement emerged in each survey type: student, family, staff? Are there any patterns?

Students: 45 students suggested that we do away with our school uniforms and/or make adjustments to our dress code and uniform policy. 10 students suggested allowing them to use their phones.

Families: Due to COVID, we had to cancel some of our school events, especially the ones scheduled for the beginning of 2022 and even the events we hosted the first semester always had limited seating capacity plus the mask requirement and health screening.

We have a strong parent engagement program, the off-site and on-site school events are a big part of our school culture. Our parents really look forward to attending these events and connecting with our teachers, staff and administrators every year. An area of improvement for the rest of this year and next year is to bring back the school events that were postponed due to COVID.

Staff: Our staff would like to suggest clearer rules and consequences for our students as well as communication of the follow up from these behaviors. Some staff reported that they would like to see more campus events, while others requested having less. Another area to note was the recommendation for hiring additional staff to provide more support for students in the classroom and a full-time counselor.

NEXT STEPS

Which suggestions is the school planning to implement to improve the school? What steps will the school take to implement those suggestions?

- Address our facility improvement needs
- Address our staffing needs
- Streamline our rules, consequences and discipline process

Cover Sheet

Discussion and Update Regarding Sale of Strip of Land to City Recreation and Parks for Purpose of Constructing Ice Hockey Rink

Section: III. Information/Discussion Items
Item: B. Discussion and Update Regarding Sale of Strip of Land to
City Recreation and Parks for Purpose of Constructing Ice Hockey Rink
Purpose: Vote
Submitted by:
Related Material:
Facilities Update Concerning Construction of Ice Hockey Rink by City of Los Angeles in
Reseda.pdf



Board Agenda Item: III B: Informational/Discussion Item

Date: April 7, 2022

To: Magnolia Public Schools ("**MPS**") Board of Directors ("**MPS Board**")

From: Alfredo Rubalcava, Chief Executive Officer and Superintendent
Patrick Ontiveros, General Counsel & Director of Facilities
Mustafa Sahin, Project Manager

RE: Facilities Update Concerning Construction of Ice Hockey Rink by City of Los Angeles in Reseda

The City of Los Angeles through its Recreation and Parks Department ("**RAP**") own the parcels immediately adjacent to the Magnolia Science Academy—1 ("**MSA—1**") high school building and parking lot. As has previously been reported to the MPS Board, RAP intends to build a skating rink on the parcel that fronts Sherman Way and an enclosed ice hockey rink on the parcel accessible via the alleyway. Further down the block RAP also owns property that will be used as parking for the skating facilities. Exhibit A illustrates the locations of the skating rinks, parking and MSA—1 properties.

In order to build the ice hockey rink, which RAP expects that the Los Angeles Kings will operate, RAP needs to add an additional strip of land approximately 25' in width. See Exhibit B. MPM Sherman Way LLC, owner in fee simple of the land on which MPS operates MSA-1, with the concurrence of MPS has expressed a willingness to sell a strip of land from its high school parking lot. In December 2020, MPM Sherman Way LLC signed a non-binding letter of intent.

With the sale of the strip of land, the MSA—1 campus will lose 33 parking spaces. MSA—1 will be granted temporary use of the RAP parking lots to satisfy its parking needs. Upon the close of escrow for the property located at 18242 Sherman Way, MSA—1 will make up for the parking lost in sale of the strip of land to RAP. In addition, MPS is in talks to acquire 26 parking spaces at the Citibank parking lot a couple parcels down from the existing MSA—1 campus. Finally, MPS has a license to use the land formerly owned by CIM. The new owner has said he will allow MSA—1 to continue to use the land until his development plans come to fruition, which MPS expects to be about one year. During that time, MPS will continue to use the land for parking and recreation among other uses.

In 2020, MPS obtained an appraisal valuing the land at \$1,000,000. In March 2022, MPS obtained an updated appraisal that values the land at \$1,360,000. RAP also obtained an appraisal which will also serve as the basis for a negotiation.

MPS Staff expects to ask the MPS Board at its May meeting to approve the sale of the strip of land to RAP. MPS Staff believes that such transaction is in the best interests of MSA—1 and MPS as MPS Staff, as part of the transaction, will negotiate use of the new ice hockey rink by MSA—1 allowing MSA—1 to host



an ice hockey team. MSA—1 will need to follow the requirements in its 2014 and 2017 bond documents that govern the sale of land that is encumbered by the lien in favor of the bonds.



Exhibit A

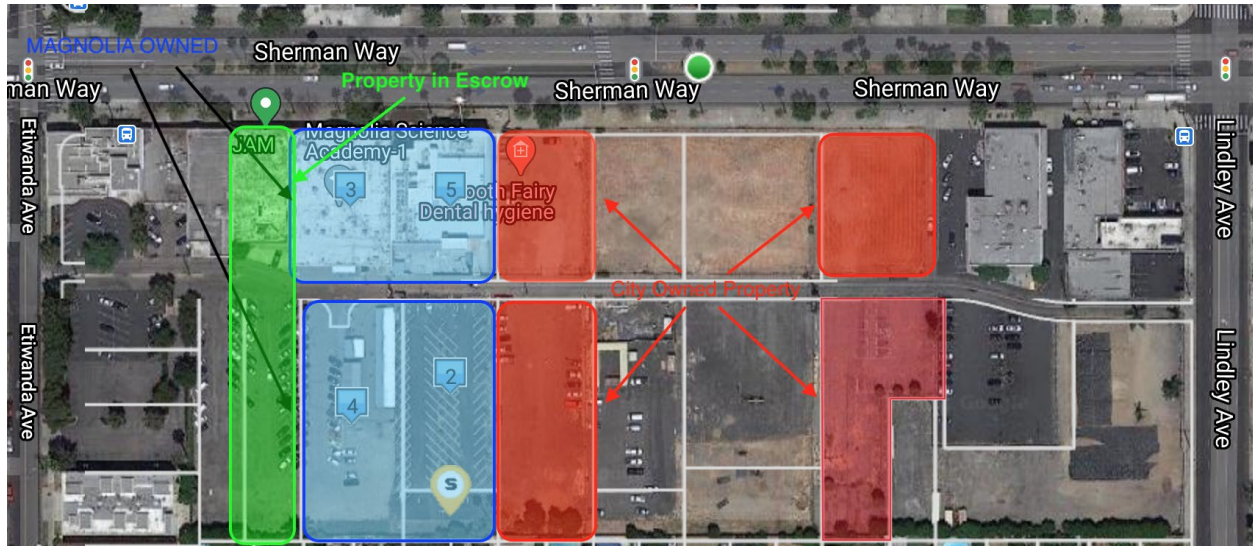
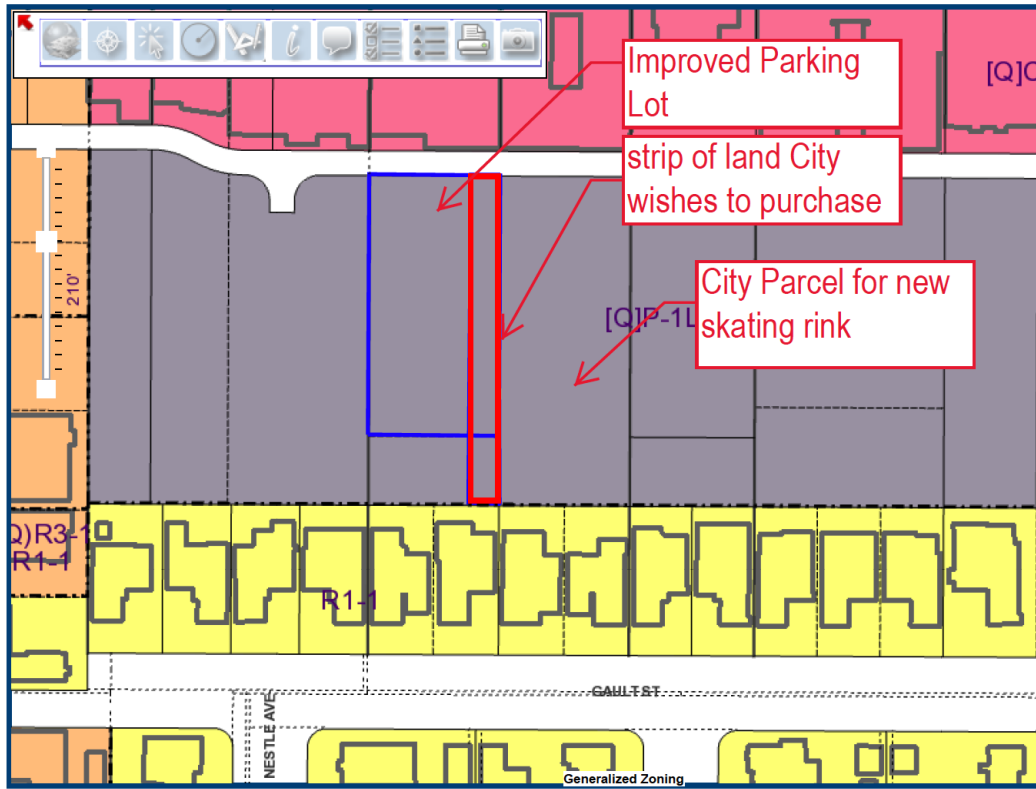




EXHIBIT B



Cover Sheet

Board Approval of Findings to Conduct Virtual Meetings Pursuant to AB 361/Government Code Section 54953

Section: IV. Action Items
Item: A. Board Approval of Findings to Conduct Virtual Meetings
Pursuant to AB 361/Government Code Section 54953
Purpose: Vote
Submitted by:
Related Material: AB 361 Findings (Magnolia Public Schools) (April 7).pdf



Board Agenda Item #	IV A: Action Item
Date:	April 7, 2022
To:	Magnolia Public Schools – Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Alfredo Rubalcava, CEO & Superintendent
RE:	Approval of Findings to Conduct Virtual Meetings Pursuant to AB 361/Government Code Section 54953

Proposed Board Recommendation

I move for the Magnolia Public Schools Board of Directors to adopt the findings relating to the ability of the MPS Board and all MPS Committees to conduct meetings due to teleconference during the State of Emergency, in reference to AB 361/Government Code Section 54953.

Introduction

In September 16, 2021, Governor Newsom signed executive order Assembly Bill (AB) 361 into law which gives local agencies, included local educational agencies (LEA) governing boards, flexibility in conducting public meetings virtually during a declared state of emergency. While AB 361 offers flexibilities similar to the expiring Executive Order N-29-20, there are some key difference in regards to public comment and meeting operations.

In order for Magnolia Public Schools (MPS) Board Meetings to trigger the AB 361 teleconferencing provisions, any of the following circumstances must follow:

- The legislative body holds a meeting during a proclaimed state of emergency, and state or local officials have imposed or recommended measures to promote social distancing
- The legislative body holds a meeting during a proclaimed state of emergency for the purpose of determining by majority vote whether, as a result of the emergency, meeting in person would present imminent risks to the health or safety of attendees
- The legislative body holds a meeting during a proclaimed state of emergency and has determined by majority vote that, as a result of the emergency, meeting in person would present imminent risks to the health or safety of attendees

Requirements under this new law include; notice of the meeting and post agendas as the Brown Act requires on our MPS websites and school sites; allow public to access the meeting and give notice for how the public can access the

meeting; include in the agenda an opportunity for all persons to attend via call-in or internet-based service; provides opportunity for the public to offer comment in the real time; provide public comment period; conduct meetings in a manner that protects the statutory and constitutional rights of the parties and the public appearing before the board; in an event of a disruption that prevents MPS from broadcasting the meeting or prevents members of the public from offering public comment, the meeting must stop and no action can be taken until access is restored.

MPS Board of Directors must make the following findings every 30 days by majority vote in order to continue utilizing the bills teleconferencing provisions which include:

- The legislative body has reconsidered the circumstances of the state of emergency
- Any of the following circumstances exist:
 - The state of emergency continues to directly impact the ability of the members to meet safely in person
 - State or local officials continue to impose or recommend measures to promote social distancing

Background

In March 2021, Governor Newsom issued Executive Order N-29-20, which, among other things, temporarily suspended certain Brown Act teleconference meeting requirements for as long as public health agencies have imposed or recommended social distancing measures, as the COVID-19 pandemic has made them unsafe. This law will sunset through September 30, 2021.

Budget Implications

N/A

Exhibits (Attachments):

- Board Findings pursuant of Government Code 54953(e)(3)



EACH THIRTY DAYS THEREAFTER FOR BOARD OF DIRECTORS & COMMITTEES

Magnolia Public Schools

Magnolia Public Schools findings pursuant to Government Code Section 54953(e)(3)

The Magnolia Public Schools Board of Directors has reconsidered the circumstances of the State of Emergency declared by the Governor on March 4, 2020, and finds the State of Emergency continues to directly impact the ability of the Directors to meet safely in person and/or that State or local officials continue to impose or recommend measures to promote social distancing.

DATE: April 7, 2022

VOTE

AYE:

NOES:

ABSENT:

BOARD SECRETARY: _____

Cover Sheet

Approval of Updated MPS Health and Safety Policy and Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum

Section: IV. Action Items
Item: B. Approval of Updated MPS Health and Safety Policy and
Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum
Purpose: Vote
Submitted by:
Related Material:
Updated MPS Health and Safety Policy and Injury and Illness Prevention Program
 (“IIPP”) COVID-19 Addendum.pdf



Board Agenda Item #	IV B: Action Item
Date:	April 7, 2022
To:	Magnolia Public Schools - Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Derya Hajmeirza, MPS HR Director
RE:	Updated MPS Health and Safety Policy and Injury and Illness Prevention Program (“IIPP”) COVID-19 Addendum

Proposed Board Motion

I move that the board approve the updated MPS Health & Safety Policy alongside the Injury Illness Prevention Program (“IIPP”) COVID-19 addendum.

Introduction

- The policy has been updated based on the guidance provided by the Centers for Disease Control and Prevention (“CDC”), the California Department of Public Health (“CDPH”), and several county public health officials. The policy is intended for organization-wide implementation at each facility that will be operated by MPS.

Background

- The board had approved the IIPP COVID-19 addendum and the MPS health and safety policy during the August 2020, and September 2020, February, March, April, May, July, August, September, November, December 2021, January, February, and March 2022 board meetings. In accordance with the most updated health orders, the Home Office COVID-19 Response Team updated the policy.

Analysis (If applicable)

- This policy is provided and updated by Young, Minney & Corr, LLP and conform to the standards and practices in the latest guidance (i.e., CDPH and Cal-OSHA, local county, and authorizing agency).

MPS Health and Safety Policy for COVID-19 updates are as follows:

- Indoor masking is strongly encouraged for all individuals at all MSA school sites. Individuals must still wear masks when entering a Nurse’s office, COVID-19 testing site, symptom, isolation and quarantine area, or other medically sensitive area.
- Individuals new to LAUSD are required to baseline test upon their start of school or work. All individuals will be required to comply with all District requirements for baseline testing upon return from school breaks, such as Spring Break.

Budget Implications: There are no budget implications.

Exhibits (attachments):

- Updated MPS Health and Safety Policy (with redline)
- Updated MPS Health and Safety Policy (without redline)



Updated on 03/18/2022

HEALTH AND SAFETY POLICY FOR COVID-19

It is the policy of Magnolia Public Schools (“Charter School”) to take all reasonable measures to prevent the spread of the novel coronavirus disease (“COVID-19”) among students and staff. In accordance with this policy, the Charter School is temporarily implementing health and safety measures to mitigate the spread of COVID-19 as the Charter School resumes in-person instruction. This policy recognizes that these measures are each designed to provide some protection against COVID-19. While there may be times when one measure may not be feasible, implementing alternative measures can provide additional layers of safety. This Policy includes both mandatory measures (using terms “shall” or “will”) as well as recommended measures intended to guide decisions in light of practical limitations.

This Policy is based on guidance provided by the Centers for Disease Control (“CDC”), the California Department of Education (“CDE”), the California Department of Public Health (“CDPH”), and relevant county public health officials. The Governor and each county public health official is vested with the authority to impose health and safety standards, which may vary by locality in response to different local conditions. The Charter School will, as necessary, consult with their county health officer, or designated staff, who are best positioned to monitor and provide advice on local conditions to individually determine whether more or less stringent measures are necessary to align with the applicable public health orders. The Charter School will fully cooperate with county public health officials regarding the screening, monitoring and documentation that will be required to permit careful scrutiny of health outcomes associated with the return to in-person instruction on Charter School campuses.

This Policy constitutes the COVID-19 Infection Control Plan for each Charter School worksite. Prior to resuming in-person instruction, the Home Office COVID-19 Response Team shall perform a comprehensive risk assessment of all work areas and work tasks in accordance with guidance from CDPH and this Policy. The following staff member(s) is (are) responsible for implementing this Policy at each campus:

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School Name	Staff Members	Phone Number
Magnolia Science Academy-1	Home Office COVID-19 Response Team	213-628-3634
	MSA-1 Compliance Task Force Team	818-609-0507
Magnolia Science Academy-2	Home Office COVID-19 Response Team	213-628-3634
	MSA-2 Compliance Task Force Team	818-758-0300
Magnolia Science Academy-3	Home Office COVID-19 Response Team	213-628-3634
	MSA-3 Compliance Task Force Team	310-637-3806
Magnolia Science Academy-4	Home Office COVID-19 Response Team	213-628-3634
	MSA-4 Compliance Task Force Team	310-473-2464
Magnolia Science Academy-5	Home Office COVID-19 Response Team	213-628-3634
	MSA-5 Compliance Task Force Team	818-705-5676
Magnolia Science Academy-6	Home Office COVID-19 Response Team	213-628-3634
	MSA-6 Compliance Task Force Team	310-842-8555
Magnolia Science Academy-7	Home Office COVID-19 Response Team	213-628-3634
	MSA-7 Compliance Task Force Team	818-886-0585
Magnolia Science Academy-8	Home Office COVID-19 Response Team	213-628-3634
	MSA-8 Compliance Task Force Team	323-826-3925
Magnolia Science Academy-Santa Ana	Home Office COVID-19 Response Team	213-628-3634

	MSA-SA Compliance Task Force Team	714-479-0115
Magnolia Science Academy-San Diego	Home Office COVID-19 Response Team	213-628-3634
	MSA-SD Compliance Task Force Team	619-644-1300
MPS Home Office	Home Office COVID-19 Response Team	213-628-3634

In addition to in-person instruction, the Charter School will also offer optional independent study as an alternative to in-person instruction in the 2021-22 school year. Independent study will also be made available for students for whom in-person instruction poses a heightened risk of infection.

1. Limited Access to Campus. As school campuses open for fully in-person instruction in the 2021-22 school year, California public health authorities have relaxed restrictions on access to school campuses; however, the ongoing threat of COVID-19 and the public health orders in effect necessitate that the following precautions be maintained:

- The Charter School may limit nonessential visitors’ access to the Charter School campus and may limit the number of students and staff with whom they come into contact, based on, among other factors, the current levels of community transmission, the vaccination status of any such visitor, and the relative importance of the visit’s purpose.
- The Charter School will exclude from the campus any employee, student, parent, caregiver or visitor who refuses to take or does not pass a Wellness and Temperature Screening.
- All visitors to a Charter School Campus are strongly encouraged to wear a face mask while inside any Charter School building, vehicle, or other enclosed space.
- Any parent or guardian picking up a student who has been placed on isolation or quarantine must stay outside campus and the student will be brought to them for dismissal.
- Signage shall be posted at all public entrances to the Charter School warning visitors not to enter if they have COVID-19 symptoms.
- Students excluded from campus on the basis of an elevated temperature or other COVID-19 related symptoms may be provided with Independent Study opportunities to support their academic success to the greatest extent possible during exclusion.
- Students and employees who are well but who have a household member that has been diagnosed with COVID-19 are directed to notify the COVID-19 Compliance Officer, who will consult with other Charter School staff to determine whether the student or staff member can

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Deleted: if that school has a mask requirement still in place. Visitors to these campuses may wear a face shield with a drape along the bottom if they are unable to wear a mask due to a medical condition, mental health condition, or disability, or if they are hearing impaired, or communicating with a person who is hearing impaired, where the ability to see the mouth is essential for communication...

continue coming to school with a modified quarantine in light of current guidance and this Policy.

- Per Cal/OSHA requirements, the Charter School shall exclude staff members who have symptoms consistent with COVID-19 or who have had a close contact with a positive COVID-19 case and are not vaccinated.
- Health and safety standards and procedures shall be applied equally to all users of a public school campus that is subject to a co-location arrangement.
- Implement health screenings of students and staff upon arrival at school (see Section 2).
- To the extent that non-parent visitors are required to enter the Charter School Campus, the School will take the following precautions:
 - Non-parental visitors will be allowed on campus via appointment only.
 - Non-parental visitors must pre-register in a visitor's log, which includes the visitor's name, email address, and phone number.
 - Non-parental visitors will only be allowed to enter specific areas to conduct their business.
 - Visitors to MSA-2, 3, 4, 6, and 8 must complete daily screening questions using LAUSD's Daily Pass or at the entrance to the school.

2. Wellness Checks and Temperature Screenings:

- *COVID-19 Symptoms.* Currently, the CDC has identified the following as potential symptoms of COVID-19:
 - Fever or chills
 - Cough
 - Shortness of breath or difficulty breathing
 - Fatigue
 - Muscle or body aches
 - Headache
 - New loss of taste or smell
 - Sore throat
 - Congestion or runny nose
 - Nausea or vomiting
 - Diarrhea
- In-person wellness checks administered under this Policy shall:
 - Confirm that the subject has not experienced COVID-19 symptoms in the prior 48 hours or potentially been exposed to COVID-19, by soliciting the following

information:

- Have you had any one or more of these symptoms today or within the past 48 hours? Are these symptoms new or not explained by another reason?
 - Fever or chills
 - Cough
 - Shortness of breath or difficulty breathing
 - Fatigue
 - Muscle or body aches
 - Headache
 - New loss of taste or smell
 - Sore throat
 - Congestion or runny nose
 - Nausea or vomiting
 - Diarrhea
- Do you live in the same household with, or have you had close contact with, someone who in the past 14 days has been in isolation for COVID-19 or had a test confirming they have the virus? Close contact means being within 6 feet of an infected person for a cumulative total of 15 minutes or more over a 24-hour period starting from 2 days before illness onset (or, for asymptomatic patients, 2 days prior to test specimen collection) until the time the person is isolated.
- If the student, staff, parent, or, visitor answers “no” to all questions, he or she may enter the school.
- If the student, staff, parent, or visitor answers “yes” to any of the questions, he or she may not enter the school. Employees, parents, and visitors answering “yes” must leave immediately and will be instructed to self-isolate until further instructions are given by the COVID-19 Compliance Officer. Students answering “yes” will be isolated and must leave as soon as pickup can be arranged and then will be instructed likewise.
- Students, staff, parents, or, visitors have had close contact with an individual who has tested positive shall return home to self-quarantine as per CDPH and local guidance.
 - However, the Charter School will not exclude such individuals with close contact exposure and not require them to return home or self-isolate if they are both asymptomatic and fully-vaccinated against COVID-19. Should an asymptomatic and fully-vaccinated individual be exposed to COVID-19, the Charter School reserves the right to request proof of vaccination for COVID-19 before allowing the individual on campus.
- Students and staff are encouraged to screen themselves for symptoms at home before

coming to campus.

- Students and staff of MSA-2, 3, 4, 6, and 8 may be subject to further health check procedures as required by LAUSD.
- A check in area should be established on campus for health screenings to be performed privately and with enough space to allow physical distancing.
- *Campus Screening Logistics:*
 - Each employee and visitor to the school site shall be screened for COVID-19 symptoms before entering the school site.
 - Temperature and wellness screenings will be performed by a trained school employee at all Charter School Campuses to the extent feasible.

3. COVID-19 Compliance Task Force and Compliance Officer. State and local health orders require that schools designate a task force and liaison to be responsible for receiving and sharing information on COVID-19 policies, positive cases, and exposures. The Charter School shall comply with these requirements by implementing the following measures:

- The Charter School will comply with and implement the “COVID-19 Exposure Management Plan Guidance in TK-12 Schools,” promulgated by the Los Angeles County Department of Public Health (“LAC DPH”). If the LAC DPH Exposure Management Plan is updated such that this Policy becomes materially inconsistent with it, the Charter School will follow the current Exposure Management Plan.
- The Charter School will establish a Compliance Task Force. The Compliance Task Force is responsible for establishing and enforcing all COVID-19 safety protocols, as well as ensuring all Charter School students and staff receive appropriate COVID-19 education. The names and contact information for all Compliance Task Force members are referenced above on pages one and two of this policy
- The Charter School will designate a “COVID-19 Compliance Officer,” to act as a liaison between the local county public health department and the Charter School, in the event of a COVID-19 cluster or outbreak at the Charter School. The name and contact information for the Charter School’s COVID-19 Compliance Officer is referenced above on pages one and two of this policy.
- The COVID-19 Compliance Officer shall monitor trends in absences and the prevalence of symptoms and illnesses among students and staff on campus to help isolate them promptly, as needed.

- The COVID-19 Compliance Officer shall be the point of contact responsible for sharing information on positive cases and exposures to relevant state and local health departments, as detailed in the Exposure Management Plan section of this Policy.
- The COVID-19 Compliance Officer shall conduct COVID-19 Task Force meetings no less than twice per month to identify areas for improving the enforcement and results of this Policy.

4. COVID-19 Testing and Reporting. Testing, in conjunction with vaccination, face masking, and other safety protocols, is a key factor in preventing COVID-19 infection. In keeping with the recommendations and requirements of state and local health departments, the Charter School shall implement the following testing and reporting procedures:

- When testing students or employees for COVID-19, the Charter School will use FDA-Authorized viral COVID-19 tests, including a Nucleic Acid Amplification Test (NAAT, such as a Polymerase Chain Reaction test or an Antigen test. An FDA-authorized over-the-counter test is acceptable for student screening so long as the results can be verified, but may not be used for the periodic testing of school employees required by the CDPH in lieu of vaccination.
- Testing will be applied on symptomatic¹, response², and asymptomatic³ bases.
- The Charter School's COVID-19 Compliance Officer must be made aware of all positive student and staff test results and shall report those results to local public health officials as required by law.
- Per Cal/OSHA Emergency Temporary Standards, the Charter School will provide testing at no cost to employees during paid time for:
 - Symptomatic unvaccinated employees, regardless of whether there is a known exposure,
 - Unvaccinated employees after an exposure,
 - Vaccinated employees after an exposure if they develop symptoms,

¹ Symptomatic testing "is used for individuals with symptoms of COVID-19, either at home or at school."

² Response testing "is used to identify positive individuals once a case has been identified in a given stable group. Response-based testing can be provided for symptomatic individuals or for asymptomatic individuals with known or suspected exposure to an individual infected with SARS-CoV-2."

³ Asymptomatic testing is "used for surveillance, usually at a cadence of every 2 weeks or less frequently, to understand whether schools have higher or lower rates of COVID19 rates than the community, to guide decisions about safety for schools and school administrators, and to inform LHDs about district level in-school rates. Asymptomatic testing can also be used for screening, usually at a higher cadence (weekly or twice weekly) than surveillance testing, to identify asymptomatic or pre-symptomatic cases, in order to exclude cases that might otherwise contribute to in-school transmission."

- Unvaccinated employees in an outbreak (three or more employee cases), or
- All employees in a major outbreak (20 or more employee cases).
- Testing Required in San Diego County:
 - No student testing will be required at MSA-SD at this time due to local transmission rates. However, the Charter School reserves the right to exclude MSA-SD students from campus who are either symptomatic for COVID-19 or who have been exposed to COVID-19, until all time and symptom criteria have been reached, consistent with public health guidance and as stated in this Policy. The Charter School will also continue to monitor local case rates to determine whether any further COVID-19 testing of students is necessary.
 - Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-SD employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at Magnolia Science Academy MSA- 2, 3, 4, 6, and 8:
 - All students and employees will undergo asymptomatic COVID-19 testing weekly, regardless of COVID-19 vaccination status.
 - Individuals who have recovered from laboratory-confirmed COVID-19 within the last 90 days are not required to test for COVID-19 unless they develop new onset symptoms.
 - Individuals vaccinated as part of the vaccination program carried out by the Los Angeles Unified School District do not need to provide proof of vaccination to the District.
 - All students and employees must undergo symptomatic and response testing for COVID-19, as needed.
 - Individuals new to LAUSD are required to baseline test upon their start of school or work. All individuals will be required to comply with all District requirements for baseline testing upon return from school breaks, such as Spring Break.
 - Employees may not use self-administered and self-read at-home rapid antigen tests unless observed by the employer or authorized telehealth proctor for purposes of clearing isolation or for establishing a positive case for purposes of being excused from weekly testing for 90 days following recovery from COVID-19.
- Testing Required at MSA-1, 5, 7 and MSA-SA:
 - All unvaccinated students must test for COVID-19 at least once per week.

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- Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-1, 5, 7, and MSA-SA employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 (PCR test only) at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at MSA-SD and Home Office:
 - Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-San Diego and Home Office employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 (PCR test only) at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at MSA-2, 3, 4, 6, and 8:
 - All employees and students are required to undergo weekly testing (PCR test) regardless of vaccination status.
- Additional levels of employee and student COVID-19 testing may be implemented in response to local disease trends, an outbreak, as determined by the Home Office COVID-19 Response Team, where required by Cal/OSHA regulations, or where otherwise required by law or public health guidance. The Charter School reserves the right to require employees undergo additional frequencies of COVID-19 testing, consistent with applicable authority, and directives from public health authorities as well as the School’s authorizer, regardless of an employee’s COVID-19 vaccination status.
- Consistent with Cal/OSHA regulations and applicable law, the School must impose different health and safety requirements depending on an employee’s COVID-19 vaccination status. Cal/OSHA defines an individual as fully vaccinated when “the employer has documented that the person received, at least 14 days prior, either the second dose in a two-dose COVID-19 vaccine series or a single-dose COVID-19 vaccine. Vaccines must be FDA approved; have an emergency use authorization from the FDA; or, for persons fully vaccinated outside the United States, be listed for emergency use by the World Health Organization (WHO).” As a result, to forego any potential COVID-19 health and safety restrictions, such as exclusion/quarantine periods, some COVID-19 testing and other directives, employees must provide the Charter School with proof of COVID-19 vaccination or complete a COVID-19 vaccination status attestation. Employees who are either unvaccinated or who decline to provide the Charter School with proof of COVID-19 vaccination or attest to their COVID-19 vaccination status

will be considered unvaccinated, and must comply with all health and safety directives, as stated in this Policy.

- For staff and student-wide testing, all staff and students shall be tested, except any staff and students who have no contact with others and do not report to campus.
- The Charter School can cause tests to be provided at any one of its campuses, or have staff get tested at any local testing site or by their health insurance provider, which must cover the cost.
 - If county-provided testing is not available, then private labs and health insurance providers may be used, and the cost of testing must be covered by the health insurance provider under an emergency state regulation.
- The Charter School's liaison must be made aware of the student and staff test results and report those results to local public health officials.
- Student consent for testing:
 - For Charter School Students aged 12 and under, the Charter School will require parental consent for COVID-19 testing.
 - Pursuant to California Family Code Section §6926 and CDPH guidance, Charter School Students aged 13 to 17 may consent to COVID-19 testing on their own.
 - Charter School students aged 18 and older do not need parental consent for COVID-19 testing.
- Students who refuse to participate in the COVID-19 testing program or to report the test results to the Charter School, where such testing is required, will not be allowed to return to in-person instruction or otherwise enter the Charter School Campus. Both the testing and the reporting are required under applicable public health guidance and legal authority.
- For staff who refuse to participate in the COVID-19 testing program or to report the test results to the Charter School, where such testing is required, the Charter School reserves the right to discipline an employee for such non-compliance, up to and including termination from at-will employment.
- Consistent with applicable law, the Charter School will consider accommodations from mandatory testing for medical reasons and any other lawfully recognized reason. Employees or students and/or parents/guardians who wish to request an accommodation for themselves or their child can contact the Charter School. The Charter School cannot guarantee the availability of particular accommodation and will process all requests for accommodation consistent with MPS policies and applicable law.
- The Charter School must maintain confidentiality of test results, other than reporting the results to local public health officials. All medical information about any employee must be stored separately from the employee's personnel file in order to limit access to this confidential information. The Charter School should have a separate confidential medical file for each

employee where the Charter School can store all of that employee's medical information. Medical information includes COVID-19 test results, an employee's statement via any symptom screening that they have symptoms or COVID-19, medical certifications showing the employee needs time off due to COVID-19, etc. For students, the Charter School will take similar precautions to safeguard the students' privacy and confidentiality, consistent with FERPA and all relevant legal requirements.

- All volunteers, contractors, vendors and other adults supporting Charter School functions on any MPS campus must comply with applicable COVID-19 testing requirements, as stated in the COVID-19 Vaccination Policy.
- In the event of a positive test result of a student or family member:
 - The Charter School requires that parents/guardians notify school administration immediately if the student tested positive for COVID-19 or if one of their household members or non-household close contacts tested positive for COVID-19.
 - Upon receiving notification that staff or a student has tested positive for COVID-19 or been in close contact with a COVID-19 case, the Charter School will take actions as required in Section 5 below.

5. Exposure Management Policy. Preventing and minimizing the spread of COVID-19 within the Charter School Community requires a sound policy for managing exposure to infected individuals. The Charter School will follow the exposure management provisions of the "COVID-19 Exposure Management Plan Guidance in TK-12 Schools," promulgated by the LAC DPH as well as "COVID-19 Public Health Guidance for K-12 Schools in California, 2021-22 School Year" promulgated by the CDPH. In the event that this protocol is updated so that it materially conflicts with the measures laid out in this Policy, the Charter School will follow the updated protocol; otherwise, the following measures shall be followed:

- Per AB 86 and California Code Title 17, section 2500, schools are required to report COVID-19 cases to the local public health department. The COVID-19 Compliance Officer shall report every positive COVID-19 case to the appropriate county authority.

- All MSA campuses will maintain classroom seating charts to facilitate future identification of close contacts.
- Potential Exposure: In the event of notice of potential exposure,⁴ with regards to its employees, the Charter School will follow all steps set forth in its Injury and Illness Prevention Program COVID-19 Addendum.
- In the event of a suspected COVID-19 case:
 - The Charter School will identify an isolation room and quarantine room and/or outdoor areas to separate anyone who exhibits COVID-19 symptoms or who is determined to have come into close contact with a confirmed case. The isolation and quarantine rooms shall be separate rooms.
 - Isolation of students, employees, and visitors exhibiting symptoms of COVID-19 will occur without regard to vaccination and/or recent testing status.
 - Any students, staff, or visitors exhibiting symptoms should immediately be provided with and required to wear a surgical-grade or better face covering and should be directed to wait in the separate isolation area until they can be transported home or to a healthcare facility, as soon as practicable. For serious illness, call 9-1-1 without delay.
 - Students in the isolation and quarantine areas will be monitored by a staff member.
 - Parents/guardians will be required to pick up their students within one hour. Parents/guardians should take the student to get a COVID-19 test immediately and, if a student of MSA- 2, 3, 4, 6, or 8, should upload the test result to the LAUSD Daily Pass system or otherwise provide a copy to the school.
 - A log will be kept of all persons entering the isolation and quarantine areas.
 - Students will be grouped by stable group or class when possible in the quarantine area.
 - Physical distancing of six feet or greater will be maintained in the isolation and quarantine areas [and masking shall be required for any individual entering these areas.](#)
- Symptomatic individuals who test negative for COVID-19 can return 24 hours after resolution of fever (if any) and improvement in symptoms.
 - Documentation of a negative test result should be provided to school administrators.

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⁴ Notice of potential exposure means any of the following: (a) notification from a public health official or licensed medical provider that an employee was exposed to a qualifying individual at the worksite; (b) notification from an employee, or their emergency contact, that the employee is a qualifying individual; (c) notification through the Charter School's testing protocol that the employee is a qualifying individual; or (d) notification from a subcontracted employer that a qualifying individual was on the school site. (Labor Code § 6409.6, subd. (d)(3).)

- In lieu of a negative test result, students and staff may return to work with a medical note by a physician that provides alternative explanation for symptoms and reason for not ordering COVID-19 testing.
- Symptomatic individuals who neither test for COVID-19 nor consult with a medical professional must isolate at home until fever free for 24 hours, improved symptoms, and 10 days from symptom onset.
- In the event of one or more confirmed COVID-19 case(s) the Charter School will follow the CDPH and local public health guidance, including implementation of the following practices:
 - The Charter School will provide notifications to the local public health department of any known case of COVID-19 among any student, employee, or visitor or other school-associated person who was present on a Charter School campus within the 14 days preceding COVID-19 symptoms, or 10 days before a positive test result.
 - MSA Los Angeles COVID-19 Compliance Officers will notify the Los Angeles County Department of Public Health of any COVID-19 hospitalizations or deaths among students or staff by sending a notification to ACDC-Education@ph.lacounty.gov.
 - Notifications will be provided by the Home Office COVID-19 Response Team depending on the county where the school is located.
 - For Los Angeles campuses: The COVID-19 Compliance Officer will instruct the individual who tested positive to follow the LACDPH COVID-19 Home Isolation instructions and will inform the positive case that LACDPH will contact them directly to collect additional information and to issue a Health Officer Order to quarantine.
 - All students and staff of MSA- 2, 3, 4, 6, and 8 campuses will be contacted by the LAUSD Community Engagement team to be instructed on isolation and to provide further information.
 - Site administrators of MSA- 2, 3, 4, 6, and 8 will report to LAUSD using the Initial Exposure Management (IEM) Reporter App, as detailed in the latest LAUSD IOC guidance on exposure management reporting.
 - The notification to the local public health department must include:
 - 1) The full name, address, telephone number, and date of birth of the individual who tested positive;
 - 2) The date the individual tested positive, the school(s) at which the individual was present on-site within the 10 days preceding the positive test, and the date the individual was last on-site at any relevant school(s); and
 - 3) The full name, address, and telephone number of the person making the report.

- For San Diego Charter School locations, the public health department should be notified either via phone at (888) 950-9905, or online at www.coronavirus-sd.com. The notification should list the following information: 1) The name of the person reporting, 2) the Charter School name and district, 3) the Charter School address, 4) your position at the Charter School. For the individual diagnosed with COVID-19, the notification should list the individual's: 1) Name, 2) date of birth, 3) contact information (phone number and email), 4) the individual's last date on the Charter School campus, and 5) any additionally relevant comments.
- For Los Angeles County Charter School locations: The Charter School will contact the LAC DPH as consistent with its "Protocol for COVID-19 Exposure Management Plan in K-12 Schools,"⁵ and either by:
 - 1) Using the LACDPH reporting portal, or:
 - <http://www.redcap.link/lacdph.educationsector.covidreport>
 - 2) Downloading and completing the COVID-19 Case and Contact Line List for the Education Sector and sending it to ACDC-Education@ph.lacounty.gov.
 - 3) Schools having difficulty reporting COVID-19 cases to LACDPH can call (833) 707-0319, Monday through Friday from 8 a.m. to 5 p.m.
- For Orange County Charter School locations: Contact the Orange County Public Health Department via phone at 714-834-8180, or via email at epi@ochca.com.
- Notify all staff and families in the school community of any positive COVID-19 case while maintaining confidentiality as required by state and federal laws.
- Close off areas used by any sick person and do not use before cleaning and disinfection.
- Investigate the COVID-19 illness and exposures and determine if any work-related factors could have contributed to risk of infection.
- Update protocols as needed to prevent further cases in accordance with CDPH Guidelines ("Responding to COVID-19 in the Workplace").
- Implement communication plans for exposure at school and potential school closures in the event of an outbreak or other necessary circumstances, to include outreach to students, parents, teachers, staff and the community.

⁵This document may be found at:

http://publichealth.lacounty.gov/media/Coronavirus/docs/protocols/ExposureManagementPlan_K12Schools.pdf

- Include information for staff regarding labor laws, California Supplemental Paid Sick Leave, emergency paid sick leave and extended family and medical leave pursuant to the FFCRA, information regarding Disability Insurance, Paid Family Leave and Unemployment Insurance, as applicable to schools.
- Maintain regular communications with the local public health department.
- Recommend testing for all students, employees, and visitors in close contact with the confirmed COVID-19 case, consistent with recommendations from the CDPH and local public health departments.
- For all settings: Provide information regarding close contacts to the county public health department via secure fax or email.
- If the school site must be closed for in-person instruction, develop a contingency plan for continuity of education using independent study. Independent study shall include all of the following:
 - Confirmation or provision of access for all students to connectivity and devices adequate to participate in the educational program and complete assigned work;
 - Content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction;
 - Academic and other supports designed to address the needs of students who are not performing at grade level, or need support in other areas, such as English learners, students with exceptional needs, students in foster care or experiencing homelessness, and students requiring mental health supports;
 - Special education, related services, and any other services required by a student's individualized education program, with accommodations necessary to ensure that individualized education program can be executed in an independent study learning environment;
 - Designated and integrated instruction in English language development for English learners, including assessment of English language proficiency, support to access curriculum, the ability to reclassify as fully English proficient, and, as applicable, support for dual language learning;
 - Providing synchronous instruction as required by law.
 - "Synchronous instruction" means classroom-style instruction or designated small group or one-on-one instruction delivered in person, or in the form of internet or telephonic communications, and involving live two-way communication between the teacher and pupil. Synchronous instruction shall be provided by the teacher of record for that pupil pursuant to Section 51747.5.

- o For TK/K-3 opportunities must occur daily.
- o For 4-8 opportunities must occur weekly along with daily live interaction.
- o For 9-12 opportunities must occur weekly.
- o Can be classroom style, designated small group, or one-on-one.
- o The “teacher of record for that pupil” pursuant to Section 51747.5 is the assigned supervising teacher who must be an employee. There is not more than one supervising teacher.
 - Charter School will document each pupil’s participation in synchronous instruction.
 - Continuing to provide school meals.
- o Provide guidance to parents, teachers and staff reminding them of the importance of community physical distancing measures while a school is closed, including discouraging students or staff from gathering elsewhere.
- o If the COVID-19 case was present on the Charter School campus, the individual must be excluded from campus for at least 5 days from COVID-19 symptom onset, or if asymptomatic, 5 days from the date the specimen was collected for the positive COVID-19 test, as detailed below.
- In the event of a cluster (three or more cases within 14 days), the Charter School will contact local county public health officials, as necessary, and work closely with such officials to determine whether the cluster is an outbreak, requiring outbreak response.⁶
- In the event of an outbreak or cluster at a Charter School:
 - o The Charter School CTF and COVID-19 Compliance Officer will work closely with local county public health officials, timely provide all required information, and otherwise comply with all CDPH and local guidance regarding outbreaks.⁷
 - o The COVID-19 Compliance Officer for MSA Los Angeles campuses will immediately call the LACDPH at (833) 707-0319 or submit an online report at <http://www.redcap.link/lacdph.educationsector.covidreport>.

⁶ In the event of a “cluster,” Los Angeles County Charter Schools must specifically report such information to the LAC DPH at LADPH at ACDC-Education@ph.lacounty.gov or by calling (888) 397-3993.

⁷ In the event of an outbreak, all Charter School locations will comply with guidance titled “Management of Outbreaks of COVID-19,” issued by the LAC DPH. This protocol can be found at: http://publichealth.lacounty.gov/media/Coronavirus/docs/education/EMPSupplement_K12Schools.pdf. In the event that other state or local guidance provides more stringent outbreak protocol, the Charter School will comply with such protocol.

- The Charter School will notify students, families, employees, and stakeholders that the Charter School and local public health department are investigating a cluster and/or outbreak. The notice will encourage all stakeholders to follow public health recommendations.
- The Charter School will additionally notify all stakeholders if the school is to be closed for 14 days due to widespread and/or ongoing transmission of COVID-19 at the school or in the general community.
- The Charter School will identify absenteeism among those in affected classes and coordinate with the LHD to contact these absentees to screen for symptoms of COVID-19 if they were exposed to a case during the case's infectious period.
- Limit visitors to the affected Charter School campus, except for those that are essential to the Charter School's mission. Law Enforcement Personnel (Sheriff and Police), Fire, Medical, Emergency, or government employees who are responding to, working at, or inspecting the facility will be allowed to access the Charter School campus.
- Discontinue all non-essential in-person group activities at the Charter School Campus during the outbreak.
- Identify absenteeism among affected classes and contact those absentees to screen for COVID-19 symptoms.
- Close Contacts and Quarantine
 - A "Close Contact" is spending a total of fifteen minutes or more over a 24-hour period within 6 feet of an infected person or, in Los Angeles County, having had unprotected contact with the infected person's body fluids and/or secretions of a person with confirmed COVID-19 (e.g., being coughed or sneezed on, sharing utensils or saliva, or providing care without using appropriate protective equipment).
 - An individual will only be considered a close contact if the Charter School is reasonably sure that they meet the above definition. Individuals will not be deemed a close contact solely because they were in the same classroom or school group as a confirmed COVID-19 case, regardless of actual proximity to the confirmed case.
 - "Fully vaccinated" refers to those who have received either a single dose vaccine or the second dose of a two-dose vaccine over two weeks ago.
 - For Los Angeles Campuses: when notifying any individual that they are a close contact of a positive case, the COVID-19 Compliance Officer will provide that individual with a copy of the LACDPH Public Health Emergency Quarantine Order. Notifications that an individual is a close contact will also contain all messages required to be included pursuant to the LACDPH K-12 Exposure Management Plan guidance.
 - *Quarantine exemptions for all MSA campuses.*

- *Employees* who are both (1) Fully vaccinated and boosted if eligible, and, (2) those who have recovered from laboratory-confirmed COVID-19 within the last 90 days **regardless of vaccination status**, may continue to attend school and do not need to quarantine at home following close contact with a positive case, so long as the employee self-monitors for symptoms, ~~does not display symptoms of COVID-19, **and** tests negative on Day 5 from exposure.~~
 - *MSA-2, 3, 4, 6, and 8 students and staff must test immediately and on Day 5 from exposure.*
 - Asymptomatic staff close contacts who are fully vaccinated and booster-eligible but not boosted may remain at the worksite after close contact on the condition that they remain asymptomatic and meet testing and masking requirements for quarantine exemption.
 - *Students* who are fully vaccinated (regardless of booster status) and (2) those who recovered from laboratory-confirmed COVID-19 within the last 90 days, may continue to attend school and do not need to quarantine at home following close contact with a positive case, so long as the student self-monitors for symptoms **for 10 days from exposure and does not display symptoms of COVID-19.**
 - *MSA-2, 3, 4, 6, and 8 students and staff must test immediately and on Day 5 from exposure.*
 - Quarantine-exempt individuals at MSA 2, 3, 4, 6, and 8 must also continue to test with the weekly mobile testing team.
- *Quarantine rules for individuals not exempt from quarantine at MSA- 1, 5, 7, and Santa Ana, and San Diego.*
 - Modified Quarantine. Close contacts of a positive case, while both parties were in a school setting supervised by staff and were correctly wearing masks for the entire exposure period, may continue to attend school during a modified quarantine, so long as they i) do not show symptoms of COVID-19, ii) continue to mask indoors *and outdoors* while at school, iii) undergo at least twice weekly testing during the quarantine, and iv) continue to quarantine from all extracurricular activities including sports and activities within the community setting. When not attending in-person instruction, students undergoing modified quarantine must otherwise remain at home for the duration of their quarantine. Modified quarantine is not available if the exposed student is part of a TK-12 outbreak. All exposed students must

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quarantine at home during an outbreak. Students undergoing modified quarantine must eat six feet from other students. Modified Quarantine may end after the Day 7 from exposure if the second test taken during quarantine is performed on or after Day 5 from exposure and is negative and the student remains asymptomatic.

- **Students at MSA Santa Ana and San Diego are strongly encouraged to but not required to mask during modified quarantine.**
 - Standard Quarantine. If an individual is not exempt from quarantine and either cannot or will not follow all of the requirements for modified quarantine, they must quarantine at home for 10 days following exposure, or for 5 days following exposure if a negative test is taken on Day 5 and the individual remains asymptomatic.
 - If any symptoms develop during the 10-day period after exposure under any type of quarantine, the exposed person must immediately isolate, get tested, and contact their healthcare provider with any questions regarding their care. Any individual who is under any type of quarantine should wear a well-fitting medical grade mask when around others for 10 days from their exposure to a positive case.
- *Modified Quarantine for individuals not exempt from quarantine at MSA 2, 3, 4, 6, and 8*
- Individuals who are identified as close contacts may participate in modified quarantine, in which exposed students and employees continue to attend school in-person unless they develop symptoms or test positive.
 - Modified quarantine can only be considered if:
 - The exposure occurred in a TK-12 setting. Students at Early Education Centers and Adult School programs are not eligible for modified quarantine and must quarantine at home if they are exposed to a positive case.
 - The exposure occurred in a school setting where students were supervised by school staff (i.e. classroom, school grounds with school staff present, school bus, etc.). Close contacts with exposure to infection at home are not eligible for modified quarantine, unless they are exempt from quarantine based on vaccination status or recent recovery from infection.
 - The school can verify that both the infected individual and the individual identified as a close contact were mask compliant during

the entire period of exposure, including outdoor exposure (masks must have been completely covering the individuals' nose and mouth). Students with face mask accommodations are not allowed to participate in modified quarantine. School administrators will report on mask compliance for each close contact when submitting IEM Reports using the IEM Reporter App.

- The exposure occurred in a school that does not have a confirmed active outbreak, as determined by LACDPH. An outbreak is when significant transmission (confirmed epidemiologically-linked cases) has occurred at a school within a 14-day period. Schools with confirmed outbreaks may not implement modified quarantine.
- Students eligible to participate in modified quarantine will appear as "Allowed" in the Principal's Daily Pass Dashboard and will be allowed to generate a Daily Pass QR code. These students will also be identified in a "Watch" column in the Daily Pass Dashboard Cases tab, to indicate to Site Administrators they are under modified quarantine protocols.
- Individuals in modified quarantine must be asymptomatic. All students will be required to respond to the Daily Pass health screening questions. Symptoms must be monitored daily, and if symptoms develop, the student cannot continue to participate in modified quarantine. Symptomatic close contacts must isolate at home and get tested immediately, preferably at a LAUSD testing site.
- Students who are participating in modified quarantine should be given the opportunity to participate in the full instructional program during the school day, including recess and lunch time. However, the school must not allow students in modified quarantine to participate in extracurricular activities, including sports, clubs, Beyond the Bell, and other before and after school care or programming. The modified quarantine is meant to let students continue learning during the instructional day but does not cover other activities outside of the regular school curriculum. Students must leave campus after school and go directly home.
- Individuals in modified quarantine must wear a surgical-style mask or higher PPE at all times on school grounds except when they are

eating or drinking. The school site should make arrangements and ensure students in modified quarantine are distanced 6 feet during meal periods when masks are removed. School sites will provide upgraded masks to students in modified quarantine if needed.

- Individuals in modified quarantine must test on or around Day 5 and twice per week for the duration of the quarantine period. Tests can be either a rapid antigen test or a PCR test. The first test should be conducted at initial exposure or as soon as possible after the exposure (Day 1); the second test must be on or after Day 5, so that the individual can be released from quarantine on Day 6 if they test negative.
 - If all of these criteria are not met, modified quarantine is not available.
- *Standard Quarantine for individuals at MSA 2, 3, 4, 6, and 8.*
- Individuals who are not exempt from quarantine and do not qualify for modified quarantine are subject to standard quarantine if they are a close contact of an individual who tests positive for COVID-19. These individuals must complete a ten-day quarantine and return on day eleven if they remain asymptomatic for the duration of quarantine unless the exposed individual ends quarantine sooner by receiving a negative result on a test taken on or after the fifth day from exposure.
 - Individuals undergoing quarantine who get tested for COVID-19 on or after the fifth day from exposure to the confirmed case may return to school on Day 6 once proof of a negative test is submitted through the Daily Pass system, but must wear a surgical mask when around others and continue to self-monitor for symptoms through day 10 from exposure. Students will be cleared to return to school through the Daily Pass system.
 - Individuals at MSA 2, 3, 4, 6, and 8 who complete their quarantine period will be cleared to return to school via the Daily Pass system.
 - All asymptomatic close contacts that have quarantined due to potential exposure will be able to test at any COVID-19 test site or with a mobile testing team, so long as they remain asymptomatic.
- All staff and students of Los Angeles campuses who are close contacts of a positive case but remain on campus due to quarantine exemption or modified quarantine must be tested on Day 5 after the date of last exposure, regardless of vaccine or booster status.

- *MSA 2, 3, 4, 6, and 8 Quarantine Guidelines for Household Close Contacts*
 - Individuals with continuous exposure to a sibling or household member who tests positive must remain at home for a minimum of 10 days following the date of the household member's positive test. These individuals are not eligible for modified quarantine, unless they are exempt from quarantine due to vaccination status or recent infection.
 - Household close contacts must stay at home for the duration of the positive household member's isolation period. Close contacts then begin their official 10-day quarantine on the date that the positive individual's isolation ends (e.g. if the household positive's isolation period ends on Day 6 due to a negative test on Day 5, this would be the individual's Day 1).
 - Close contacts should test on or after Day 5 of their official quarantine period to return to school or work on Day 6.
 - Positive household members must consistently wear an upgraded, surgical-style mask at home for a full 10 days following the date of their positive test, even if they are allowed to return to school or work on Day 6. If this condition cannot be met, the household close contact must delay the start of their official quarantine until Day 11.
- Quarantine rules for all employees are stated in the COVID-19 Injury and Illness Prevention Program ("IIPP") addendum.
- For individuals who test positive for COVID-19:
 - Checking for false positives on Los Angeles Unified School District Sites only (MSA-2, 3, 4, 6 and 8):
 - To reduce unnecessary anxiety and isolation/quarantine of students and staff, the Charter School shall re-test asymptomatic individuals who have tested positive for COVID-19 as required by the Los Angeles Unified School District.
 - If an individual (student or staff) receives a positive test result, the Los Angeles Unified School District Community Engagement Team will contact the individual to conduct an interview and confirm whether he or she has symptoms consistent with COVID-19.
 - *Symptomatic Positive Case.* If the individual is determined to be symptomatic, has a known exposure to a positive case, and/or is in a high prevalence setting (i.e., a campus with more than one active case), the Los Angeles Unified School District Community Engagement Team will direct the individual to isolate for at least 5 days per the latest CDPH isolation guidance and quarantine all close contacts per Los Angeles County Department of Public Health guidelines.

- *Asymptomatic Positive Case.* If the individual is determined to be asymptomatic, has no known exposure, and is in a low prevalence setting (i.e., a campus with more than one active case), the individual will be asked to isolate, and all close contacts will be asked to quarantine. The individual will be directed to re-test within 48 hours of the positive sample collection.
 - If the confirmatory test returns a negative result, the Los Angeles County Department of Public Health will approve the false positive request and report it to the State of California. The individual is thereafter released from isolation and all close contacts are released from quarantine. The Los Angeles Unified School District Community Engagement Team will then deactivate the positive case and be permitted to access District sites again.
 - If the confirmatory test returns a positive result, the Los Angeles Unified School District Community Engagement Team will direct the individual to isolate for at least 5 days per the latest CDPH guidance and all close contacts will continue to quarantine per Los Angeles County Department of Public Health guidelines. The individual will not be permitted to access district owned sites in the meantime.
 - Checking for false positives at all other MSA campuses:
 - If an individual (student or staff) receives a positive test result, the COVID-19 Home Office Response Team will contact the individual to conduct an interview and confirm whether he or she has symptoms consistent with COVID-19.
 - All students and staff who test positive for COVID-19 and are determined to be asymptomatic will be strongly encouraged to re-test within 48 hours of the initial positive sample collection.
 - If the confirmatory test is negative the COVID-19 Home Office Response Team will alert the local public health department to the false positive and will release the individual from isolation and will alert all known close contacts that they may cease quarantining.
 - If the confirmatory test is positive, the individual shall continue to isolate and all close contacts shall continue to quarantine.
 - Persons with COVID-19 may discontinue [self-isolation](#) under the following conditions:
 - At least 5 days have passed since symptom onset or, if asymptomatic, since their positive test; AND

- At least 24 hours have passed since resolution of fever without the use of fever-reducing medications; AND
 - Other symptoms have resolved or are improving; AND
 - An FDA authorized COVID-19 viral test (antigen preferred) test taken on or after Day 5 from symptom onset is negative.
 - NOTE: If fever reduction, improvement of other symptoms, or a negative test are not all achieved, isolation may not end until after Day 10 from symptom onset or, if asymptomatic, their positive test, so long as 24 hours have passed since resolution of fever and all other symptoms are not present or are improving.
 - Note: For staff, per CAL/OSHA COVID-19 Prevention ETS, testing that is required for employees must be provided by the employer free of charge and during work hours; these tests may not be self-administered or self-read unless they are observed by the employer or an authorized telehealth proctor.
 - No matter when isolation ends, all students and staff **recovering from COVID-19** must wear a highly protective non-cloth mask when around others for a full 10 days from testing positive or onset of symptoms.
 - The School will comply with Cal/OSHA regulations regarding when employees may return to work after exposure, as detailed in the Charter School’s IIPP addendum.
- Subsequent School Closure Criteria:
 - Charter School campuses that are open for in-person instruction may subsequently and temporarily close for in-person instruction based on the following criteria:
 - As determined by and in consultation with the local health department
 - After closure, the Charter School may reopen after 14 days, cleaning, disinfection, conclusion of a public health investigation, and local health department consultation.
- **Group Tracing** Until further notice, and as recommended by the CDPH all MSA schools shall have the option to utilize the “group tracing” method of exposure management in place of individual contact tracing to track exposures during the Omicron variant surge, as follows:
 - Schools will notify students who spent more than a cumulative total of 15 minutes (within a 24-hour time period) in a shared indoor airspace (e.g., classroom) with someone with COVID-19 during their period of infectiousness.
 - Notification should occur to “groups” of exposed students (e.g., classmates, teammates, cohorts, etc.) rather than contact tracing to identify individual “close contacts” (e.g., those within 6 feet).

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By order of LAUSD, the following temporary measures are in place until further notice and control over inconsistent generally-applicable elements of this policy.¶

Temporary Suspension of Individual Contact Tracing at TK-12 Schools:

Site Administrators are not required to identify close contacts for positive cases at their sites and will instead adopt a “group tracing” approach. This suspension does not apply to Early Education students, including preschool, ETK, and PALS students.¶

Under “group tracing” Site Administrators are not responsible for identifying close contacts or submitting IEM Reports for positive case exposures that occur in a school setting. Instead, schools will adopt a “group tracing” approach after a positive case identified.¶

Under this approach, Site Administrators or designees must:¶

Identify groups (e.g., classrooms) who share the same indoor airspace at school for at least 15 consecutive minutes (within 24 hours) of the positive case, and¶

Notify the entire relevant group(s) of potential exposure to a positive case, and¶

Provide instructions on actions that should be taken. This notification can be done by email or other messages to the identified group.¶

Site Administrators or their designee must submit an IEM Report to create close contact cases for the following groups:¶

All Early Education students, including preschool, ETK, and PALS students – unless recently recovered from a positive COVID-19 result in the last 90 days¶

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- Notifications should be provided to all individuals considered exposed, including those who are vaccinated and/or recently infected.
- Exposed students, regardless of COVID-19 vaccination status or prior infection, are strongly encouraged to be tested for COVID-19 with at least one diagnostic test obtained within 3-5 days after last exposure. Any FDA-approved antigen diagnostic test, PCR diagnostic test, or pooled PCR test is acceptable for evaluation of an individual's COVID-19 status. Individuals who have been recently infected should use antigen testing.
- Exposed Students who participate in testing may continue to take part in all aspects of K-12 schooling, including sports and extracurricular activities, unless they develop symptoms or test positive for COVID-19.
- All exposed students, regardless of vaccination status or previous infection, are strongly recommended to remain fully masked indoors and outdoors, unless actively eating or drinking, when around other through day 10 from their last exposure date. Eating and drinking should occur distanced from others. Exposed students will also need to remain masked at all times during sports and extracurricular activities.
 - Students are strongly encouraged but not required to mask following an exposure.

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6. Sanitizing/hygiene materials and practices:

- The Charter School will develop plans and routines to ensure that students and staff wash or sanitize hands frequently, including upon arrival to campus, after using the restroom, after playing outside and returning to the classroom, before and after eating, and after coughing or sneezing.
- Staff will teach and reinforce proper handwashing technique, avoiding contact with one's eyes, nose, and mouth, using a tissue to wipe the nose, and covering coughs and sneezes.
- The Charter School shall make soap, tissues, no-touch trashcans, face coverings, water and paper towels or dryers for hand washing available. Students and staff should wash their hands for 20 seconds with soap, rubbing thoroughly after application. Soap products marketed as "antimicrobial" are not necessary or recommended.
- Trash cans will be placed near restroom doors and students and staff will be instructed to use a paper towel to prevent touching the handle with their hands.
- A restroom will need to be dedicated for individuals in the isolation area. This restroom must be cleaned and sanitized before other occupants may use it.
- If handwashing stations near classrooms are not practicable, and to facilitate use by students and staff as needed, the Charter School shall make available fragrance-free alcohol-based hand

sanitizer that is at least sixty percent (60%) ethyl alcohol. (Note: frequent handwashing is more effective than the use of hand sanitizers). This hand sanitizer will be made available to both students and staff at all strategic locations throughout the Charter School Campus.

- The Charter School will not use hand sanitizer with isopropyl alcohol as the main ingredient.
- Children under age 9 should only use hand sanitizer under adult supervision. Call Poison Control if consumed: 1-800-222-1222.
- Children under age 9 should only use hand sanitizer under adult supervision. Hand sanitizer will also not be left out in the open in classrooms for students under the age of 9.
- The Charter School shall place posters conspicuously that encourage hand hygiene to help stop the spread of COVID-19.
- Employees should visit the CDC's coughing and sneezing etiquette and clean hands webpage for more information.

7. Routine cleaning and disinfecting: The Charter School will maintain a high level of cleanliness throughout the year to help reduce the risk of exposure to and spread of COVID-19 at the school site. In general, cleaning once a day is usually enough to sufficiently remove potential virus that may be on surfaces. Disinfecting (using disinfectants on the [U.S. Environmental Protection Agency COVID-19](#) list) removes any remaining germs on surfaces, which further reduces any risk of spreading infection.

- Custodial staff will perform routine and thorough cleaning once per day, and when students are not present. When cleaning, the space will be aired out before children arrive.
- Routine cleaning practices include, but are not limited to:
 - Using everyday janitorial cleaning supplies and disinfectants for surfaces as floors, tables, desks, counters, sinks, toilets, and other hard-surfaced furniture and equipment;
 - Dusting hard surfaces;
 - Damp wiping of hard surfaces to ensure they are free of debris;
 - Wet mopping of floors;
 - Vacuuming carpets and mats.
- Health Office areas, including the general health office, isolation area, and quarantine area, may require more frequent cleaning and rapid response, as needed.
- Student restrooms will be serviced at least twice a day and will be fully cleaned and disinfected using electrostatic equipment by the night cleaning crew once per day.
- The Charter School will clean and disinfect areas commonly visited by staff no less than once per day during operating hours and implement a schedule for such cleaning and disinfecting. These areas include, but are not limited to: Break rooms, restrooms, lobbies, classrooms, laboratories, nurse's office, counseling and student support areas, staff offices, and cafeterias.

- The Charter School will clean high touch areas in staff breakrooms at least once per day.
- Cleaning and Disinfection after a Confirmed Case on Campus:
 - If an individual confirmed to have COVID-19 was on campus, the Charter School will complete enhanced cleaning and disinfection procedures in the spaces occupied by the confirmed COVID-19 case.
 - Employees completing this cleaning must wear a mask and gloves at all times and will refer to Material Safety Data Sheets or follow the instructions on the chemical labels.
 - When disinfecting, the Charter School will use an EPA-registered disinfectant that is approved for emerging pathogens.
 - Custodians will focus on immediate areas occupied by the confirmed COVID-19 case.
 - Custodians will clean and disinfect:
 - All non-porous surfaces in the ill occupant's space/office, as well as on shared equipment (like tablets, touch screens, keyboards, remote controls) in bathrooms and shared spaces used by the ill person. Cleaning and disinfection will also focus on high-touch surfaces (e.g. desk, table, hardbacked chair, doorknob, light switch, handle, computer, keyboard, mouse, telephones).
 - On porous surfaces (e.g., carpets, chairs) in the confirmed COVID-19 case's space or office, custodians will remove visible contamination, clean with appropriate cleaners, and disinfect with a liquid/spray indicated for use on the material.
 - The space(s) where the confirmed COVID-19 case was present may be reoccupied once these cleaning and disinfection procedures have been completed.
- The Charter School will ensure proper ventilation during all cleaning and disinfecting. Staff are encouraged to introduce fresh outdoor air as much as possible, by opening windows where practicable.
- The Charter School will comply with [CDPH Guidance on Ventilation of Indoor Environments and Ventilation and Filtration to Reduce Long-Range Airborne Transmission of COVID-19 and Other Respiratory Infections: Considerations for Reopened Schools](#) to the greatest extent practicable for each facility.
- All frequently touched surfaces in the workplace, such as chairs, desks, tables, keyboards, telephones, handrails, light switches, sink handles, restroom surfaces and door handles, will be routinely cleaned.
- Staff will be trained as appropriate in the chemical hazards, manufacturer's directions, and Cal/OSHA requirements for safe and correct application of cleaning and disinfectant agents in accordance with the Healthy Schools Act guidance from the California Department of Pesticide Regulation and Cal/OSHA.

- When choosing disinfecting products, the Charter School will use those approved for use against COVID-19 on the Environmental Protection Agency (EPA)- approved list “N” and require staff to follow product instructions. MSA-2, 3, 4, 6, and 8 will use disinfectants from the LAUSD's List of Approved Hand Sanitizers and Disinfectants.
 - To reduce the risk of asthma and other health effects related to disinfecting, the Charter School will select disinfectant products on list N with asthma-safer ingredients (hydrogen peroxide, citric acid or lactic acid) as recommended by the US EPA Design for Environment program.
 - The Charter School will avoid products that contain peroxyacetic (peracetic) acid, sodium hypochlorite (bleach) or quaternary ammonium compounds, which can cause asthma.
 - Staff shall follow label directions for appropriate dilution rates and contact times.
 - The Charter School will establish a cleaning and disinfecting schedule in order to avoid both under- and over-use of cleaning products.

Subject to available resources, disposable disinfecting wipes shall be made available so that employees can wipe down commonly used surfaces (e.g., doorknobs, keyboards, remote controls, desks, other work tools and equipment) before each use. Disinfectant wipes and sprays will be kept away from students.

8. Facility measures: The Charter School will incorporate CDE guidance measures for maintaining a healthy facility, to include some or all of the following:

- Maintenance staff will regularly inspect and test ventilation systems and fans to confirm they operate properly and will increase circulation of outdoor air as much as possible by opening windows and doors and other methods.
- Windows and doors should not be opened if doing so poses a safety or health risk by exacerbating seasonal allergies or asthma symptoms.
 - The Charter School will consider alternatives, such as increased central air filtration (targeted filter rating of at least MERV 13) if opening windows poses a safety or health risk to persons using the facility.
- HVAC systems will be set to maximize indoor/outdoor air exchanges unless outdoor conditions (recent fire, high outdoor temperature, humidity, and pollen levels) make this inappropriate.
- If an HVAC system becomes nonoperational, additional ventilation should be provided with the use of fans or relocating classes until repairs are completed.
- The COVID-19 isolation and quarantine areas should be outdoors when feasible to maximize ventilation and minimize exposures to COVID-19 infection. Under no

circumstances should an isolation or quarantine area be in a room without a functioning HVAC system.

- Maintenance staff will ensure that all water systems and features (e.g., drinking fountains) are safe to use after a prolonged facility shutdown to minimize the risk of Legionnaires' disease and other diseases associated with water.
- Consider installing additional temporary handwashing stations at all school entrances and near classrooms to minimize movement and congregation in bathrooms.
- Consider installing privacy boards or clear screens to increase and enforce separation between staff and students.

9. Physical distancing: The Charter School will incorporate CDPH and CDE guidance with respect to physical distancing between students on campus as much as is feasible, including maximizing physical distance as much as possible while eating (especially indoors), using additional spaces outside of the cafeteria for mealtime seating such as classrooms or the gymnasium can help facilitate distancing, and arrange for eating outdoors as much as feasible.

- In areas where physical distancing is not feasible, clear plastic or solid surface barriers that can be cleaned often may be used.
- Employees will be encouraged to eat outdoors. They may also eat at their desk or cubicle if these areas are enclosed as a separate room, provide more distance, or include barriers.

10. Extracurricular Activities:

- All extracurricular activities operated by or supervised by school personnel or occurring on a school site, whether or not occurring during school hours, will be undertaken in compliance with this policy and all required public health measures applicable to K-12 schools. This applies to sports, band, chorus, clubs, and other similar activities and organizations. All MSA campuses will operate and supervise extracurricular activities in compliance with the latest California Department of Public Health K-12 guidance and any other relevant state or county guidance on sports and extracurricular activities.
- MSA Los Angeles sports programs will observe all required elements of the most updated version of the Los Angeles County Department of Public Health's "COVID-19 Exposure Management Plan Guidance, Youth Recreational Sports Programs" and the Los Angeles County Department of Public Health's "Protocol for Organized Youth Sports: Appendix S" in addition to any future binding guidance applicable to K-12 youth sports programs.
 - Each Los Angeles campus's COVID-19 Compliance Officer shall fulfill the duties of the COVID-19 Organized Youth Sports Program Compliance Officer, as those duties are described in LACDPH's sports-related COVID-19 guidance.

- Each Los Angeles campus’s COVID-19 Compliance Officer shall ensure that the required LACDPH youth sports exposure management protocols are followed in accordance with current guidance.
- Each Los Angeles campus’s COVID-19 Compliance Officer shall ensure that all mandatory testing required by the LACDPH’s youth sports guidance is conducted in accordance with current guidance.
- All MSA extracurricular programs will keep updated rosters of all participating students and staff to facilitate identification of close contacts.
- Students of MSA 2, 3, 4, 6 and 8 will not be permitted to participate in extracurricular activities starting October 31, 2021, unless they provide proof of COVID-19 vaccination through the Daily Pass system.

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- Indoor mask use remains an effective layer in protecting against COVID-19 infection and transmission, including during sports, music, and related activities, especially activities with increased exertion and/or voice projection, or prolonged close face-face contact.

Accordingly:

- Masks are strongly recommended indoors at all times for teachers, referees, officials, coaches, and other support staff.
- Masks are strongly recommended indoors for all spectators and observers.
- Masks are strongly recommended indoors at all times when participants are not actively practicing, conditioning, competing, or performing. Masks are also strongly recommended indoors while on the sidelines, in team meetings, and within locker rooms and weight rooms.
- When actively practicing, conditioning, performing, or competing indoors, masks are strongly recommended by participants even during heavy exertion, as practicable. Individuals using instruments indoors that cannot be played with a mask (e.g., wind instruments) are strongly recommended to use bell coverings and maintain a minimum of 3 feet of physical distancing between participants. If masks are not worn (or bell covers are not used) due to heavy exertion, it is strongly recommended that individuals undergo screening testing at least once weekly, unless they had COVID-19 in the past 90 days. An FDA-authorized antigen test, PCR test, or pooled PCR test is acceptable for evaluation of an individual's COVID-19 status.

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All indoor sports must be played with masks on, unless doing so is recognized as unsafe by a well-recognized health authority, such as the American Academy of Pediatrics.

Theater, music, dance, and similar classes and clubs should maintain physical distancing, in addition to the use of face masks where possible.

When engaged in activities that could generate respiratory droplets such as enunciating (i.e., theater workshops) or dancing, physical distancing should be increased and activities should be conducted outdoors where possible.

Individual singers may practice alone in doors without a mask or with a single instructor present while indoors in a studio or practice room, if both of them are appropriately masked.

All group musical activities require participants to wear masks indoors. Masks are only not required for outdoor practice outdoors alone and with enhanced physical distancing or when along indoors in a studio or practice room with the door closed.

Masks must be worn at all times during rehearsals, performances, and other activities that involve multiple individuals participating together indoors.

Any activity that requires participants to remove their face masks may only be done as a group if the activity is held outdoors. However, individuals may practice such activities alone indoors in a studio or practice room with the door closed. Playing of wind instruments indoors is an exception as described below.

Playing of wind instruments is permitted indoors in a group setting so long as the following safety measures are adhered to:

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11. Use of Face Coverings: The Charter School will follow CDPH, CDE and CDC guidance and state and local health orders on the use of face coverings. All staff are encouraged to review the CDPH and CDC guidance on cloth face coverings; face coverings must be used in accordance with CDPH Guidance and this Policy unless a person is subject to exemption.

- All MSA students are strongly recommended but no longer required to wear a face mask when indoors at any Charter School Campus building, bus, or other enclosed space. Individuals must still wear masks when entering a Nurse's office, COVID-19 testing site, symptom and wellness check area, isolation or quarantine area, or other medically sensitive area.
- No person at any MSA campus can be prevented from wearing a mask as a condition of participation in an activity or entry into the school site unless wearing a mask would pose a safety hazard.
- Charter School employees at the Home Office—which is not a school site—are permitted to forego indoor masking so long as the Charter School performs all verifications required under Section 4(c) of the current LACDPH Order of the Health Officer (2/23/2022).
- Face masks—to the extent they are required—are required without regard to vaccination status.
- Face masks and face shields, if required, may be removed for meals, snacks, naptime, showers, or outdoor recreation, or when needing to be replaced. When any type of face covering is temporarily removed, it should be placed in a clean paper bag (marked with the student's name and date) until it needs to be put on again.
- The Charter School will provide face coverings for students and staff who lose their face coverings or forget to bring them to school.
- Employees should wear a clean face mask to work every day if still required to wear one.
- Employees are expected to teach and reinforce proper use of face coverings, and in limited circumstances, face shields.
- The Charter School will post signs regarding the need for, proper use, removal, and washing of face coverings and shall educate students, particularly younger elementary school students, on the rationale and proper use of face coverings.
- When pedagogically necessary, Teachers still subject to an indoor face mask requirement may use clear plastic face shields with an appropriate seal (cloth covering extending from the bottom edge of the shield and tucked into the shirt collar) or transparent masks in certain limited situations in the classroom to enable students to see their faces and avoid potential barriers to phonological instruction as long as the wearer maintains physical distance from others to the extent practicable. Staff must return to wearing their normal surgical-grade face covering at all other times, unless otherwise exempted.

Deleted: Santa Ana and San Diego

Deleted: <#>MSA Los Angeles students are still required to wear face masks when indoors. Masking at these campuses is optional outdoors.

Deleted: <#>All adults in K-12 school setting except San Diego school site, including all teachers, staff, parents, visitors, and outside workers, must wear a surgical-grade masks or higher level PPE when in any indoor space shared with students or other staff. The Charter School will provide upgraded masks to individuals subject to this requirement, if necessary.

Deleted: <#>Masking Rules at MSA 2, 3, 4, 6, and 8
All individuals must wear surgical-grade, non-cloth masks of multiple layers of non-woven material with a nose-wire or cloth masks that meet American Society for Testing and Materials (ASTM) standards for high filtration efficiency (ASTM F3502-2 Level 2) or have a particle filtration efficiency of at least 95% when indoors at all times except when eating or drinking.
Outdoor masking is optional for students and employees.
The Charter School will inform parents of the types of masks that are acceptable for students to wear indoors on campus. It is the parent/guardian's responsibility to check the LACDPH website to ensure that any cloth mask meets the appropriate criteria.
The Charter School will also inform parents of the lifting of the outdoor masking requirement.
The Charter School will encourage and work with teachers and school staff to establish systems and routines for students when transitioning from indoor spaces to outdoor, for students opting to unmask outdoors. This can include:
A dedicated storage space for masks;
Reminders to students to mask when they enter indoor spaces;

... [3]

- The Charter School will evaluate any employee's request for accommodation from the Charter School's facial covering policy/requirement pursuant to the MPS Employee Handbook and applicable law for all lawfully recognized accommodations. Employees requesting an accommodation from the facial covering policy/requirement must provide appropriate documentation and contact human resources.
- Per Los Angeles County Department of Health Guidance, employees based in Los Angeles County who are granted exemptions from wearing a mask while indoors must undergo COVID-19 testing at least twice per week, unless the employee provides proof of full vaccination against COVID-19 and proof of receipt of any vaccine booster to which the employee is eligible.
- Accommodations for students:
 - Pursuant to CDPH Guidance on the use of face masks, individuals with a medical condition, mental health condition, or disability that prevents wearing a mask are to be accommodated with an exemption from mask wearing. This includes those who are hearing impaired as well as those who communicate with the hearing impaired.
 - If a student cannot wear a mask due to a medical condition, mental health condition, or disability, he or she should wear the next most effective alternative that can be tolerated, such as a transparent face shield with a cloth draping sealing the bottom.
 - Parents/guardians who believe their student may need an accommodation from the Charter School's facial covering policy and requirement should contact the Charter School principal.
 - Upon receipt of appropriate documentation, the Charter School will evaluate requests for accommodation and determine what, if any accommodations the Charter School can provide.
 - Assessment of whether a medical condition, mental health condition, or disability warrants a mask accommodation is a medical determination that must be made by a physician, nurse practitioner, **physician assistant**. Self-attestation and parental attestation for mask exemptions due to the aforementioned conditions do not constitute medical determinations.
 - Students exempted from wearing a mask or face shield, **where they are still required**, are strongly encouraged to be vaccinated against COVID-19 and to receive boosters when eligible and to be tested for COVID-19 at least twice a week. If a student is exempt from wearing any type of face covering and is not vaccinated, the Charter School shall implement physical distancing and other isolation measures to the greatest degree feasible.

12. Use of Gloves and Personal Protective Equipment: The Charter School is no longer required by emergency public health orders to require the use of gloves and personal protective equipment. Any employee or student who wishes to wear gloves and/or personal protective equipment beyond the required facial coverings may do so, provided that they dispose of them safely and appropriately and do not wear gloves or personal protective equipment of a type or in a manner that interferes with their ability to perform their duties. Upon request, the Charter School will provide gloves, a face mask, protective gown, and a medical grade mask to any employee dealing with sick children, performing cleaning or disinfection, providing instruction to any students with a face mask exemption, or where there is an otherwise heightened likelihood of contact with respiratory secretions or other bodily fluid.

13. Support for Students at Increased Risk of Becoming Infected or Unrecognized Illness. Pursuant to state and local health guidance, the Charter School has developed the following measures to mitigate the risk of COVID-19 to vulnerable student groups:

- The Home Office COVID-19 Response Team or designee will review student health plans, including 504 Plans, to identify students who may need additional accommodations to minimize potential exposure.
- The Home Office COVID-19 Response Team or designee will develop a process for engaging families for potentially unknown concerns that may need to be accommodated.
- The Charter School will identify additional preparations for classroom and non-classroom environments as needed to ensure the safety of students at increased risk of becoming infected or having unrecognized illness. Persons who might be at increased risk of becoming infected or having unrecognized illness include the following:
 - Individuals who have limited mobility or require prolonged and close contact with others, such as direct support providers and family members;
 - Individuals who have trouble understanding information or practicing preventive measures, such as hand washing and physical distancing; and
 - Individuals who may not be able to communicate symptoms of illness.
- The Charter School is prepared for opening to provide Free Access to Public Education (“FAPE”) in the least restrictive environment (“LRE”) for each student. All students with disabilities will receive services according to their IEP. In accordance with IDEA, it is critical to reinforce the understanding that students receiving special education services, or 504 accommodations are general education students first. Balancing the educational needs with the health and well-being of students and staff is our top priority.

- Every child and adolescent with a disability is entitled to FAPE and is entitled to special education services based on their individualized education program (IEP). The Charter School continuously review and problem solve to balance safety and service needs. In order to provide the required level of safety, systems, processes and service delivery models have been reviewed. Adherence to social distancing guidelines will be followed as feasible except for instances when the services outlined in a specific IEP call for closer proximity. This will be evaluated on a case-by-case basis. For example, additional provision of PPE supplies to staff (gloves, gowns, face shields and Plexiglas dividers) who are required to deliver hand-over-hand instruction or hygiene service needs for students.
- Evaluations and Timelines:
 - All IDEA/ADA compliance timelines will be followed on schedule and in accordance with IDEA/ADA regulations. IEP Team meetings and 504 meetings that were missed due to the March school facility closures will be rescheduled and conducted as soon as possible, if not already conducted. All IEP team meetings and 504 meetings will be conducted virtually until the use of school facilities return to normal operations.
- Services:
 - The IDEA allows for flexibility in determining how to meet the individualized needs of students receiving special education services. State guidelines for the delivery of special education and related services will be implemented while protecting the health and safety of students as well as the individuals providing the services.
 - If a student is unable to access their education in person due to medical or other circumstances, including the inability to wear a face covering, alternative means of delivering these services will be provided.
 - The Charter School will provide appropriate protective equipment relative to the responsibilities of all Support Service Staff and disability needs.
 - All Staff and students will receive training on the appropriate use of PPE and healthy hygiene practices that are proven to mitigate the spread of COVID-19.
- The Charter School will identify additional preparations for classroom and non-classroom environments as needed to ensure the safety of students at increased risk of becoming infected or having unrecognized illness. Persons who might be at increased risk of becoming infected or having unrecognized illness include the following:
 - Individuals who have limited mobility or require prolonged and close contact with others, such as direct support providers and family members;
 - Individuals who have trouble understanding information or practicing preventive measures, such as hand washing and physical distancing; and
 - Individuals who may not be able to communicate symptoms of illness.

14. COVID-19 Vaccination Policy for Employees. The Charter School has adopted the following COVID-19 employee vaccination policy (“Employee Vaccination Policy”). The purpose of this Employee Vaccination Policy is to protect the health, safety, and well-being of all Charter School employees, students, families, and stakeholders to the maximum extent possible, and to facilitate a safe and meaningful return to in-person instruction. The Charter School drafted this policy in compliance with all applicable federal and state laws, including guidance from the Equal Employment Opportunity Commission (“EEOC”), Centers for Disease Control and Prevention (“CDC”), the California Department of Public Health (“CDPH”), and local health authorities.

- Pursuant to the California “State Public Health Officer Order of August 11, 2021,” (“Order”) all employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MSA -1, 5, Santa Ana, and San Diego campuses must either provide the School with proof of COVID-19 vaccination status or test for COVID-19 at least once per week. For employees, this directive is a condition of both employment and continued employment.
- Pursuant to the LAUSD’s “COVID-19 Vaccination Requirement for Employees and Other Adults Working at District Facilities” document issued August 13, 2021, all employees, contractors and other adults providing services at any MSA-2, 3, 4, 6, and 8 campuses must be fully vaccinated against COVID-19 no later than October 15, 2021. This directive is a condition of both employment and continued employment.
- Pursuant to the LAUSD’s December 16, 2021 communication, the LAUSD employee vaccine mandate will apply to all LAUSD authorized sites which includes MSA-7.
- **Proof of COVID-19 Vaccination:**
 - Consistent with applicable law, the Charter School will only accept the following forms of proof of COVID-19 vaccination:
 - COVID-19 Vaccination Record Card (issued by the Department of Health and Human Services Centers for Disease Control & Prevention or WHO Yellow Card) which includes name of person vaccinated, type of vaccine provided and date last dose administered); OR
 - A photo of a Vaccination Record Card as a separate document; OR
 - A photo of the client's Vaccination Record Card stored on a phone or electronic device; OR
 - Documentation of COVID-19 vaccination from a health care provider; OR
 - Digital record that includes a QR code that when scanned by a SMART Health Card reader displays to the reader client name, date of birth, vaccine dates and vaccine type; OR

- Documentation of vaccination from other contracted employers who follow these vaccination records guidelines and standards.
 - Any MPS employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MPS campus who either fails to provide proof of COVID-19 or provides proof of vaccination that is not consistent with the above-referenced acceptable forms of proof will be deemed unvaccinated.
 - Employees may their submit proof of COVID-19 vaccination to the MPS Human Resources Department.
 - The Charter School will securely maintain the confidentiality of employee COVID-19 vaccination data in strict compliance with all applicable legal authority.
- **COVID-19 Employee Testing:**
 - Pursuant to the Order, all MPS employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MSA-1, 5, 7, Santa Ana, and San Diego campuses who are either unvaccinated or incompletely vaccinated must undergo COVID-19 testing (PCR only) at least once per week.
 - Previous history of COVID-19 from which the individual recovered more than ninety (90) days earlier, or a previous positive antibody test for COVID-19, do not waive this requirement for testing.
 - As outlined above, all employees at any MSA-2, 3, 4, 6, and 8 campuses must test for COVID-19 at least once per week, regardless of COVID-19 vaccination status, as directed by the LAUSD.
- **Accommodations:** Employees may request an accommodation from COVID-19 vaccinations and/or COVID-19 testing due to a medical issue or sincerely held religious belief, practice or observance that may prevent an employee from vaccinating or testing for COVID-19. Upon receiving a request for accommodation from COVID-19 testing and/or vaccinations, the Charter School will engage in the interactive process and determine what, if any accommodations can be provided. However, the Charter School may not be required to provide an employee with an accommodation, should it result in a direct threat to health and safety at the School or to the employee or if the accommodation will cause an undue hardship for the School, among other reasons.
- **Compliance Period:**
 - Employees at the MSA -1, 5, Santa Ana, and San Diego campuses must submit proof of COVID-19 vaccination to the Charter School before October 15, 2021. Such employees who fail to submit proof of COVID-19 vaccination before this date will be deemed unvaccinated and must be required to test for COVID-19 at least once per week. On or after October 15, 2021, employees to fail to test for COVID-19 will be

deemed in non-compliance with this policy, absent an approved, legally recognized accommodation from such testing.

- Employees at MSA-2, 3, 4, 6, and 8 campuses must submit proof of COVID-19 vaccination to the Charter School before October 15, 2021. Such employees who fail to submit proof of COVID-19 vaccination before this date will be deemed in non-compliance with this policy, absent an approved, legally recognized accommodation from such testing.
- Employees at MSA-7 must submit proof of vaccination to the Charter School at a time to be determined by the LAUSD.
- **Non-Compliance:**
 - Any employee deemed to be in non-compliance with this policy may be subject to disciplinary action, up to and including termination from at-will employment.
 - The Charter School reserves the right to refuse entry to campus to any volunteer, vendor, contractor other adult supporting Charter School functions, should they fail to comply with the proof of vaccination and testing directives as stated in this Policy.
- All employees who have not yet vaccinated should do so outside of working hours. Employees who demonstrate they are unable to get vaccinated outside working hours may use either COVID-19 Supplemental Paid Sick Leave or accrued sick leave for time spent attending a COVID-19 vaccination appointment. In such cases, employees must consult with their supervisors regarding the best time to be excused to receive the vaccine and are responsible for arranging coverage during their absence to get vaccinated, if applicable.
- Employees who experience symptoms related to a COVID-19 vaccine that prevent the employee from being able to work or telework may be entitled to COVID-19 Supplemental Paid Sick Leave, if available and upon request.
- The Charter School will not discriminate, harass, or retaliate against any employee for receiving the COVID-19 vaccine or for electing not to receive the COVID-19 vaccine. However, the School reserves the right to appropriately discipline an employee for non-compliance with this policy, consistent with applicable law.
- As public health and legal guidance regarding COVID-19 vaccinations evolves, the Charter School reserves the right to revise this Employee Vaccination Policy. Upon any revision to this Employee Vaccination Policy, the Charter School will provide immediate notice in writing to all employees.
- Employee with any questions regarding the Charter School's Employee Vaccination Policy may contact Human Resources Department at hr@magnoliapublicschools.org.

15. COVID-19 Vaccination Policy for Students. The Charter School has adopted the following COVID-19 student vaccination policy (“Student Vaccination Policy”). The purpose of this Student Vaccination Policy is to protect the health, safety, and well-being of all Charter School employees, students, families, and stakeholders to the maximum extent possible, and to facilitate a safe and meaningful return to in-person instruction. The Charter School drafted this policy in compliance with all applicable federal and state laws, including guidance from the Equal Employment Opportunity Commission (“EEOC”), Centers for Disease Control and Prevention (“CDC”), the California Department of Public Health (“CDPH”), and local health authorities.

- Pursuant to the directive of the Los Angeles Unified School District, all students of MSA-2, 3, 4, 6, 7, and 8 who are eligible to receive COVID-19 vaccination must be vaccinated against COVID-19 by the first day of the 2022-2023 school year, unless medically exempted, or they will not be permitted on campus. At this time, the Student Vaccination Policy applies only to students at MSA-2, 3, 4, 6, 7, and 8.
- **Proof of Vaccination.**
 - Vaccination status can only be proven by one of the following methods acknowledged by the California Department of Public Health:
 - COVID-19 Vaccination Record Card (issued by the Department of Health and Human Services Centers for Disease Control and Prevention or WHO Yellow Card) which includes the name of the person vaccinated, type of vaccine provided and date last dose administered; OR
 - A photo of a Vaccination Record Card as a separate document; OR
 - A photo of the client’s Vaccination Record Card stored on a phone or electronic device; OR
 - Documentation of COVID-19 vaccination from a health care provider; OR
 - Digital record that includes a QR code that when scanned by a SMART Health Card reader display to the reader client name, date of birth, vaccine dates and vaccine type.
- **Parental Consent.**
 - Parent/guardian consent is required for vaccination of students 12-17 years of age.
 - A student consent form is available at the Daily Pass Portal at <https://DailyPass.lausd.net> and is included to be filled out as part of the process of making an appointment to receive COVID-19 vaccination from the Los Angeles Unified School District.
 - Parents/guardians may be present at, but will not be required to attend, their child’s appointment to receive a COVID-19 vaccination from the Los Angeles Unified School District.

- **Compliance Requirements.**
 - To provide proof of vaccination, parents/guardians must upload adequate documentary proof of vaccination to the Daily Pass system and ensure that the information appears in the “Vaccinations” tab of their student’s Daily Pass. Students vaccinated by the Los Angeles Unified School District do not need to submit their vaccination record, as it will be automatically updated following receipt of the vaccine.
 - At this time, the Pfizer-BioNTech COVID-19 vaccine is the only vaccine approved for individuals aged 12 to 17. Students who are 18 or older may also use the Johnson & Johnson or Moderna vaccine to satisfy the vaccination requirement.
 - To meet the deadlines imposed by the Los Angeles Unified School District for student vaccination, students aged 12+ should receive their first dose of the Pfizer-BioNTech vaccine no later than 5 weeks prior, and second shot no later than two weeks prior, to the vaccination requirement deadline. To meet the vaccination deadline, students aged 18+ should receive the single dose of the Johnson & Johnson vaccine no later than two weeks prior to the vaccination deadline. And, to meet the deadline using the Moderna vaccine, students should receive their first shot no later than 6 weeks prior to their deadline with their second shot coming no later than two weeks prior to the vaccination requirement deadline.
 - Students of MSA 2, 3, 4, 6 and 8 who are 12 and older will not be permitted to participate in extracurricular activities starting October 31, 2021, unless they provide proof of COVID-19 vaccination through the Daily Pass system.
- **Exemptions and Conditional Admissions.**
 - Parents/guardians may apply for exemptions from the COVID-19 vaccine requirements only for medical reasons. The medical exemption process must be followed with the completion of the *Student Medical Exemption to the COVID-19 Vaccine* form and its submission via the Daily Pass portal.
 - Students who are not in compliance by the deadline may be conditionally admitted if they are in one of the following groups: 1) foster youth, 2) experiencing homelessness, 3) migrant, 4) military family, or 5) has an IEP.
 - There are no religious or personal belief exemptions to the Student Vaccination Policy. Because this Student Vaccination Policy is implemented at the directive of the Los Angeles Unified School District, the Charter School cannot grant exemptions outside of those granted through the District’s Daily Pass process.
- MSA 2, 3, 4, 6, 7, and 8 students who fail to comply with the Student Vaccination Policy by the first day of Fall Semester 2022, will be excluded from physically entering campus.

- MSA 2, 3, 4, 6, and 8 students will still be required to comply with all COVID-19 testing frequencies mandated by the Los Angeles Unified School District without regard to vaccination status.

16. Communications to the Charter School Community: The Charter School will keep families, staff, and the community informed, engaged, and in touch as the new school year begins, by implementing the following communications measures:

- The Charter School will engage with families and staff to develop strategies to prepare and respond to the COVID-19 emergency, including guidelines for families about when to keep students home from school and other topics.
- Communications will include a process for engaging families for potentially unknown concerns that may need to be accommodated.
- Prior to the start of the school year, the Charter School will communicate to staff, students, and parents about new, COVID-19-related protocols, including:
 - Proper use, removal and washing of face coverings.
 - Screening practice.
 - How COVID-19 is spread.
 - COVID-19 specific symptom identification.
 - Preventing the spread of COVID-19 if you are sick, including the importance of not coming to work if staff members have symptoms, or if they or someone they live with has been diagnosed with COVID-19, including pertinent isolation and quarantine policies.
 - Local community testing sites and options for obtaining COVID-19 testing from private medical providers, including any testing arranged by the Charter School.
 - Guidelines for employees regarding COVID-19 specific symptom identification and when to seek medical attention.
 - Guidelines for families about when to keep students home from school.
 - Systems for self-reporting symptoms.
 - Criteria and plan to close schools again for physical attendance of students.
 - Changes in Charter School extracurricular, academic, and meal programs to help prevent the spread of COVID-19.
 - Contact information at the Charter School for students who may have been exposed to COVID-19.
 - Charter School contact information if a student has COVID-19 symptoms or may have been exposed to COVID-19.
- The Charter School will provide information to parents and guardians regarding this Policy

and related guidance, along with the safety measures that will be in place in indoor and outdoor settings with which parents and guardians must comply.

- This Policy will be posted at all public entrances to the Charter School campus.
- The Charter School will develop a communications plan for implementation if the school has a positive COVID-19 case in accordance with CDPH and CDE guidelines.

The MPS CEO/Superintendent is authorized to implement changes or additions to this policy in order to ensure compliance or consistency with new or revised orders or guidance from local, county, state or federal authorities (“Agencies”), to take any and all actions consistent with orders and guidance from the Agencies that is not specifically addressed by this policy, and to ensure compliance with the Charter School’s charter petition. The MPS CEO/Superintendent shall provide the Board with regular updates as to actions taken pursuant to this section.

Appendix

Site Specific Planning Form

This document has been included to align with the Los Angeles Unified School District’s (“LAUSD”)’s COVID-19 Containment, Response and Control Plan (“Containment Plan”). Pursuant to the LAUSD’s Containment Plan, the LAUSD is requiring all Los Angeles Unified schools complete this form, along with the pre-filled versions of the Los Angeles County Department of Public Health COVID-19 Reopening Protocols for K-12 Schools: Appendices T1 and T2 documents.

School Name: _____

Date Last Revised: _____

School Address: _____

Location Code: _____

School Phone Number: _____

Campus Density

- Approximate Square Footage open: _____
- Maximum Student Capacity: _____

- Maximum Number of Staff with physical distancing: _____
- Total Number of Students Enrolled: _____
- 25% of Total Number of Students Enrolled: _____
- In-person class size is limited to: _____
- The **maximum** number of students & staff permitted on campus at any one time to ensure no more than 25% of total student body and to maximize physical distancing is:

Specialized Services for defined subgroups of children (T1)			
Enter the estimated total number of students that will return per grade (if none, enter 0)			
TK:	3:	5:	9:
K:	4:	6:	10:
1:	5:	7:	11:
2:	6:	8:	12:
Estimated total number of administrators, teachers, and other employees on campus supporting resumption of all permitted in-person services for students: _____			

Services

The [Grab & Go Food Center](#) located closest to this school is at:

- School Name: _____
- Address: _____

The [COVID-19 Test Center](#) located closest to this school is at:

- School Name: _____
- Address: _____

School COVID-19 Compliance Task Force

Name	Job Title	Role
	(Principal)	Leader
		COVID-19 Compliance Officer
	(School Administrative Assistant)	Attendance Monitor
	(Plant Manager)	Cleaning/Disinfecting Operations
	(School Nurse)	Exposure Management Advisor
		Health Office Manager
		Data Collection Manager

Health Office Set-up and Staff

Type of Health Office	Indoor vs. Outdoor	Location	Staff Person(s)	Alternate	Runner
General Health Office (Non-COVID)					
Isolation Area (Recommended Outdoors)					
Quarantine Area					

School Communications

The following information was sent to parents/students prior to the start of in-person services: (check all that apply)	
<input type="checkbox"/> Isolation and quarantine policies as they apply to students who have symptoms or may have been exposed	<input type="checkbox"/> Options for COVID-19 testing if the student or a family member has symptoms or exposure to COVID-19
<input type="checkbox"/> Changes in school meals to avert risk	<input type="checkbox"/> Required use of face coverings
<input type="checkbox"/> How to conduct a symptom check before students leave home for school	<input type="checkbox"/> Changes in academic and extracurricular programs to avert risk
<input type="checkbox"/> Importance of student compliance with physical distancing and infection control policies	<input type="checkbox"/> Who to contact at the school if students have symptoms or may have been exposed
<input type="checkbox"/> School policies concerning parent visits to school and advisability of contact the school remotely	<input type="checkbox"/> Importance of providing up-to-date emergency contact information, including multiple parent contact options

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Updated on 04/07/2022

HEALTH AND SAFETY POLICY FOR COVID-19

It is the policy of Magnolia Public Schools (“Charter School”) to take all reasonable measures to prevent the spread of the novel coronavirus disease (“COVID-19”) among students and staff. In accordance with this policy, the Charter School is temporarily implementing health and safety measures to mitigate the spread of COVID-19 as the Charter School resumes in-person instruction. This policy recognizes that these measures are each designed to provide some protection against COVID-19. While there may be times when one measure may not be feasible, implementing alternative measures can provide additional layers of safety. This Policy includes both mandatory measures (using terms “shall” or “will”) as well as recommended measures intended to guide decisions in light of practical limitations.

This Policy is based on guidance provided by the Centers for Disease Control (“CDC”), the California Department of Education (“CDE”), the California Department of Public Health (“CDPH”), and relevant county public health officials. The Governor and each county public health official is vested with the authority to impose health and safety standards, which may vary by locality in response to different local conditions. The Charter School will, as necessary, consult with their county health officer, or designated staff, who are best positioned to monitor and provide advice on local conditions to individually determine whether more or less stringent measures are necessary to align with the applicable public health orders. The Charter School will fully cooperate with county public health officials regarding the screening, monitoring and documentation that will be required to permit careful scrutiny of health outcomes associated with the return to in-person instruction on Charter School campuses.

This Policy constitutes the COVID-19 Infection Control Plan for each Charter School worksite. Prior to resuming in-person instruction, the Home Office COVID-19 Response Team shall perform a comprehensive risk assessment of all work areas and work tasks in accordance with guidance from CDPH and this Policy. The following staff member(s) is (are) responsible for implementing this Policy at each campus:

School Name	Staff Members	Phone Number
Magnolia Science Academy-1	Home Office COVID-19 Response Team	213-628-3634
	MSA-1 Compliance Task Force Team	818-609-0507
Magnolia Science Academy-2	Home Office COVID-19 Response Team	213-628-3634
	MSA-2 Compliance Task Force Team	818-758-0300
Magnolia Science Academy-3	Home Office COVID-19 Response Team	213-628-3634
	MSA-3 Compliance Task Force Team	310-637-3806
Magnolia Science Academy-4	Home Office COVID-19 Response Team	213-628-3634
	MSA-4 Compliance Task Force Team	310-473-2464
Magnolia Science Academy-5	Home Office COVID-19 Response Team	213-628-3634
	MSA-5 Compliance Task Force Team	818-705-5676
Magnolia Science Academy-6	Home Office COVID-19 Response Team	213-628-3634
	MSA-6 Compliance Task Force Team	310-842-8555
Magnolia Science Academy-7	Home Office COVID-19 Response Team	213-628-3634
	MSA-7 Compliance Task Force Team	818-886-0585
Magnolia Science Academy-8	Home Office COVID-19 Response Team	213-628-3634
	MSA-8 Compliance Task Force Team	323-826-3925
Magnolia Science Academy-Santa Ana	Home Office COVID-19 Response Team	213-628-3634

	MSA-SA Compliance Task Force Team	714-479-0115
Magnolia Science Academy-San Diego	Home Office COVID-19 Response Team	213-628-3634
	MSA-SD Compliance Task Force Team	619-644-1300
MPS Home Office	Home Office COVID-19 Response Team	213-628-3634

In addition to in-person instruction, the Charter School will also offer optional independent study as an alternative to in-person instruction in the 2021-22 school year. Independent study will also be made available for students for whom in-person instruction poses a heightened risk of infection.

1. Limited Access to Campus. As school campuses open for fully in-person instruction in the 2021-22 school year, California public health authorities have relaxed restrictions on access to school campuses; however, the ongoing threat of COVID-19 and the public health orders in effect necessitate that the following precautions be maintained:

- The Charter School may limit nonessential visitors' access to the Charter School campus and may limit the number of students and staff with whom they come into contact, based on, among other factors, the current levels of community transmission, the vaccination status of any such visitor, and the relative importance of the visit's purpose.
- The Charter School will exclude from the campus any employee, student, parent, caregiver or visitor who refuses to take or does not pass a Wellness and Temperature Screening.
- All visitors to a Charter School Campus are strongly encouraged to wear a face mask while inside any Charter School building, vehicle, or other enclosed space.
- Any parent or guardian picking up a student who has been placed on isolation or quarantine must stay outside campus and the student will be brought to them for dismissal.
- Signage shall be posted at all public entrances to the Charter School warning visitors not to enter if they have COVID-19 symptoms.
- Students excluded from campus on the basis of an elevated temperature or other COVID-19 related symptoms may be provided with Independent Study opportunities to support their academic success to the greatest extent possible during exclusion.
- Students and employees who are well but who have a household member that has been diagnosed with COVID-19 are directed to notify the COVID-19 Compliance Officer, who will consult with other Charter School staff to determine whether the student or staff member can

continue coming to school with a modified quarantine in light of current guidance and this Policy.

- Per Cal/OSHA requirements, the Charter School shall exclude staff members who have symptoms consistent with COVID-19 or who have had a close contact with a positive COVID-19 case and are not vaccinated.
- Health and safety standards and procedures shall be applied equally to all users of a public school campus that is subject to a co-location arrangement.
- Implement health screenings of students and staff upon arrival at school (see Section 2).
- To the extent that non-parent visitors are required to enter the Charter School Campus, the School will take the following precautions:
 - Non-parental visitors will be allowed on campus via appointment only.
 - Non-parental visitors must pre-register in a visitor's log, which includes the visitor's name, email address, and phone number.
 - Non-parental visitors will only be allowed to enter specific areas to conduct their business.
 - Visitors to MSA-2, 3, 4, 6, and 8 must complete daily screening questions using LAUSD's Daily Pass or at the entrance to the school.

2. Wellness Checks and Temperature Screenings:

- *COVID-19 Symptoms.* Currently, the CDC has identified the following as potential symptoms of COVID-19:
 - Fever or chills
 - Cough
 - Shortness of breath or difficulty breathing
 - Fatigue
 - Muscle or body aches
 - Headache
 - New loss of taste or smell
 - Sore throat
 - Congestion or runny nose
 - Nausea or vomiting
 - Diarrhea
- In-person wellness checks administered under this Policy shall:
 - Confirm that the subject has not experienced COVID-19 symptoms in the prior 48 hours or potentially been exposed to COVID-19, by soliciting the following

information:

- Have you had any one or more of these symptoms today or within the past 48 hours? Are these symptoms new or not explained by another reason?
 - Fever or chills
 - Cough
 - Shortness of breath or difficulty breathing
 - Fatigue
 - Muscle or body aches
 - Headache
 - New loss of taste or smell
 - Sore throat
 - Congestion or runny nose
 - Nausea or vomiting
 - Diarrhea
 - Do you live in the same household with, or have you had close contact with, someone who in the past 14 days has been in isolation for COVID-19 or had a test confirming they have the virus? Close contact means being within 6 feet of an infected person for a cumulative total of 15 minutes or more over a 24-hour period starting from 2 days before illness onset (or, for asymptomatic patients, 2 days prior to test specimen collection) until the time the person is isolated.
- If the student, staff, parent, or, visitor answers “no” to all questions, he or she may enter the school.
- If the student, staff, parent, or visitor answers “yes” to any of the questions, he or she may not enter the school. Employees, parents, and visitors answering “yes” must leave immediately and will be instructed to self-isolate until further instructions are given by the COVID-19 Compliance Officer. Students answering “yes” will be isolated and must leave as soon as pickup can be arranged and then will be instructed likewise.
- Students, staff, parents, or, visitors have had close contact with an individual who has tested positive shall return home to self-quarantine as per CDPH and local guidance.
 - However, the Charter School will not exclude such individuals with close contact exposure and not require them to return home or self-isolate if they are both asymptomatic and fully-vaccinated against COVID-19. Should an asymptomatic and fully-vaccinated individual be exposed to COVID-19, the Charter School reserves the right to request proof of vaccination for COVID-19 before allowing the individual on campus.
- Students and staff are encouraged to screen themselves for symptoms at home before

coming to campus.

- Students and staff of MSA-2, 3, 4, 6, and 8 may be subject to further health check procedures as required by LAUSD.
- A check in area should be established on campus for health screenings to be performed privately and with enough space to allow physical distancing.
- *Campus Screening Logistics:*
 - Each employee and visitor to the school site shall be screened for COVID-19 symptoms before entering the school site.
 - Temperature and wellness screenings will be performed by a trained school employee at all Charter School Campuses to the extent feasible.

3. COVID-19 Compliance Task Force and Compliance Officer. State and local health orders require that schools designate a task force and liaison to be responsible for receiving and sharing information on COVID-19 policies, positive cases, and exposures. The Charter School shall comply with these requirements by implementing the following measures:

- The Charter School will comply with and implement the “COVID-19 Exposure Management Plan Guidance in TK-12 Schools,” promulgated by the Los Angeles County Department of Public Health (“LAC DPH”). If the LAC DPH Exposure Management Plan is updated such that this Policy becomes materially inconsistent with it, the Charter School will follow the current Exposure Management Plan.
- The Charter School will establish a Compliance Task Force. The Compliance Task Force is responsible for establishing and enforcing all COVID-19 safety protocols, as well as ensuring all Charter School students and staff receive appropriate COVID-19 education. The names and contact information for all Compliance Task Force members are referenced above on pages one and two of this policy
- The Charter School will designate a “COVID-19 Compliance Officer,” to act as a liaison between the local county public health department and the Charter School, in the event of a COVID-19 cluster or outbreak at the Charter School. The name and contact information for the Charter School’s COVID-19 Compliance Officer is referenced above on pages one and two of this policy.
- The COVID-19 Compliance Officer shall monitor trends in absences and the prevalence of symptoms and illnesses among students and staff on campus to help isolate them promptly, as needed.

- The COVID-19 Compliance Officer shall be the point of contact responsible for sharing information on positive cases and exposures to relevant state and local health departments, as detailed in the Exposure Management Plan section of this Policy.
- The COVID-19 Compliance Officer shall conduct COVID-19 Task Force meetings no less than twice per month to identify areas for improving the enforcement and results of this Policy.

4. COVID-19 Testing and Reporting. Testing, in conjunction with vaccination, face masking, and other safety protocols, is a key factor in preventing COVID-19 infection. In keeping with the recommendations and requirements of state and local health departments, the Charter School shall implement the following testing and reporting procedures:

- When testing students or employees for COVID-19, the Charter School will use FDA-Authorized viral COVID-19 tests, including a Nucleic Acid Amplification Test (NAAT, such as a Polymerase Chain Reaction test or an Antigen test. An FDA-authorized over-the-counter test is acceptable for student screening so long as the results can be verified, but may not be used for the periodic testing of school employees required by the CDPH in lieu of vaccination.
- Testing will be applied on symptomatic¹, response², and asymptomatic³ bases.
- The Charter School’s COVID-19 Compliance Officer must be made aware of all positive student and staff test results and shall report those results to local public health officials as required by law.
- Per Cal/OSHA Emergency Temporary Standards, the Charter School will provide testing at no cost to employees during paid time for:
 - Symptomatic unvaccinated employees, regardless of whether there is a known exposure,
 - Unvaccinated employees after an exposure,
 - Vaccinated employees after an exposure if they develop symptoms,

¹ Symptomatic testing “is used for individuals with symptoms of COVID-19, either at home or at school.”

² Response testing “is used to identify positive individuals once a case has been identified in a given stable group. Response-based testing can be provided for symptomatic individuals or for asymptomatic individuals with known or suspected exposure to an individual infected with SARS-CoV-2.”

³ Asymptomatic testing is "used for surveillance, usually at a cadence of every 2 weeks or less frequently, to understand whether schools have higher or lower rates of COVID19 rates than the community, to guide decisions about safety for schools and school administrators, and to inform LHDs about district level in-school rates. Asymptomatic testing can also be used for screening, usually at a higher cadence (weekly or twice weekly) than surveillance testing, to identify asymptomatic or pre-symptomatic cases, in order to exclude cases that might otherwise contribute to in-school transmission.”

- Unvaccinated employees in an outbreak (three or more employee cases), or
- All employees in a major outbreak (20 or more employee cases).
- Testing Required in San Diego County:
 - No student testing will be required at MSA-SD at this time due to local transmission rates. However, the Charter School reserves the right to exclude MSA-SD students from campus who are either symptomatic for COVID-19 or who have been exposed to COVID-19, until all time and symptom criteria have been reached, consistent with public health guidance and as stated in this Policy. The Charter School will also continue to monitor local case rates to determine whether any further COVID-19 testing of students is necessary.
 - Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-SD employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at Magnolia Science Academy MSA- 2, 3, 4, 6, and 8:
 - All students and employees will undergo asymptomatic COVID-19 testing weekly, regardless of COVID-19 vaccination status.
 - Individuals who have recovered from laboratory-confirmed COVID-19 within the last 90 days are not required to test for COVID-19 unless they develop new onset symptoms.
 - Individuals vaccinated as part of the vaccination program carried out by the Los Angeles Unified School District do not need to provide proof of vaccination to the District.
 - All students and employees must undergo symptomatic and response testing for COVID-19, as needed.
 - Individuals new to LAUSD are required to baseline test upon their start of school or work. All individuals will be required to comply with all District requirements for baseline testing upon return from school breaks, such as Spring Break.
 - Employees may not use self-administered and self-read at-home rapid antigen tests unless observed by the employer or authorized telehealth proctor for purposes of clearing isolation or for establishing a positive case for purposes of being excused from weekly testing for 90 days following recovery from COVID-19.
- Testing Required at MSA-1, 5, 7 and MSA-SA:
 - All unvaccinated students must test for COVID-19 at least once per week.

- Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-1, 5, 7, and MSA-SA employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 (PCR test only) at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at MSA-SD and Home Office:
 - Consistent with California’s “State Public Health Officer Order of August 11, 2021,” all MSA-San Diego and Home Office employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on campus must either provide the School with proof of COVID-19 vaccination or test for COVID-19 (PCR test only) at least once per week, consistent with applicable law and the Charter School’s COVID-19 employee vaccination policy.
- Testing Required at MSA-2, 3, 4, 6, and 8:
 - All employees and students are required to undergo weekly testing (PCR test) regardless of vaccination status.
- Additional levels of employee and student COVID-19 testing may be implemented in response to local disease trends, an outbreak, as determined by the Home Office COVID-19 Response Team, where required by Cal/OSHA regulations, or where otherwise required by law or public health guidance. The Charter School reserves the right to require employees undergo additional frequencies of COVID-19 testing, consistent with applicable authority, and directives from public health authorities as well as the School’s authorizer, regardless of an employee’s COVID-19 vaccination status.
- Consistent with Cal/OSHA regulations and applicable law, the School must impose different health and safety requirements depending on an employee’s COVID-19 vaccination status. Cal/OSHA defines an individual as fully vaccinated when “the employer has documented that the person received, at least 14 days prior, either the second dose in a two-dose COVID-19 vaccine series or a single-dose COVID-19 vaccine. Vaccines must be FDA approved; have an emergency use authorization from the FDA; or, for persons fully vaccinated outside the United States, be listed for emergency use by the World Health Organization (WHO).” As a result, to forego any potential COVID-19 health and safety restrictions, such as exclusion/quarantine periods, some COVID-19 testing and other directives, employees must provide the Charter School with proof of COVID-19 vaccination or complete a COVID-19 vaccination status attestation. Employees who are either unvaccinated or who decline to provide the Charter School with proof of COVID-19 vaccination or attest to their COVID-19 vaccination status

will be considered unvaccinated, and must comply with all health and safety directives, as stated in this Policy.

- For staff and student-wide testing, all staff and students shall be tested, except any staff and students who have no contact with others and do not report to campus.
- The Charter School can cause tests to be provided at any one of its campuses, or have staff get tested at any local testing site or by their health insurance provider, which must cover the cost.
 - If county-provided testing is not available, then private labs and health insurance providers may be used, and the cost of testing must be covered by the health insurance provider under an emergency state regulation.
- The Charter School's liaison must be made aware of the student and staff test results and report those results to local public health officials.
- Student consent for testing:
 - For Charter School Students aged 12 and under, the Charter School will require parental consent for COVID-19 testing.
 - Pursuant to California Family Code Section §6926 and CDPH guidance, Charter School Students aged 13 to 17 may consent to COVID-19 testing on their own.
 - Charter School students aged 18 and older do not need parental consent for COVID-19 testing.
- Students who refuse to participate in the COVID-19 testing program or to report the test results to the Charter School, where such testing is required, will not be allowed to return to in-person instruction or otherwise enter the Charter School Campus. Both the testing and the reporting are required under applicable public health guidance and legal authority.
- For staff who refuse to participate in the COVID-19 testing program or to report the test results to the Charter School, where such testing is required, the Charter School reserves the right to discipline an employee for such non-compliance, up to and including termination from at-will employment.
- Consistent with applicable law, the Charter School will consider accommodations from mandatory testing for medical reasons and any other lawfully recognized reason. Employees or students and/or parents/guardians who wish to request an accommodation for themselves or their child can contact the Charter School. The Charter School cannot guarantee the availability of particular accommodation and will process all requests for accommodation consistent with MPS policies and applicable law.
- The Charter School must maintain confidentiality of test results, other than reporting the results to local public health officials. All medical information about any employee must be stored separately from the employee's personnel file in order to limit access to this confidential information. The Charter School should have a separate confidential medical file for each

employee where the Charter School can store all of that employee's medical information. Medical information includes COVID-19 test results, an employee's statement via any symptom screening that they have symptoms or COVID-19, medical certifications showing the employee needs time off due to COVID-19, etc. For students, the Charter School will take similar precautions to safeguard the students' privacy and confidentiality, consistent with FERPA and all relevant legal requirements.

- All volunteers, contractors, vendors and other adults supporting Charter School functions on any MPS campus must comply with applicable COVID-19 testing requirements, as stated in the COVID-19 Vaccination Policy.
- In the event of a positive test result of a student or family member:
 - The Charter School requires that parents/guardians notify school administration immediately if the student tested positive for COVID-19 or if one of their household members or non-household close contacts tested positive for COVID-19.
 - Upon receiving notification that staff or a student has tested positive for COVID-19 or been in close contact with a COVID-19 case, the Charter School will take actions as required in Section 5 below.

5. Exposure Management Policy. Preventing and minimizing the spread of COVID-19 within the Charter School Community requires a sound policy for managing exposure to infected individuals. The Charter School will follow the exposure management provisions of the "COVID-19 Exposure Management Plan Guidance in TK-12 Schools," promulgated by the LAC DPH as well as "COVID-19 Public Health Guidance for K-12 Schools in California, 2021-22 School Year" promulgated by the CDPH, and other local counties. In the event that this protocol is updated so that it materially conflicts with the measures laid out in this Policy, the Charter School will follow the updated protocol; otherwise, the following measures shall be followed:

- Per AB 86 and California Code Title 17, section 2500, schools are required to report COVID-19 cases to the local public health department. The COVID-19 Compliance Officer shall report every positive COVID-19 case to the appropriate county authority.

- All MSA campuses will maintain classroom seating charts to facilitate future identification of close contacts.
- Potential Exposure: In the event of notice of potential exposure,⁴ with regards to its employees, the Charter School will follow all steps set forth in its Injury and Illness Prevention Program COVID-19 Addendum.
- In the event of a suspected COVID-19 case:
 - The Charter School will identify an isolation room and quarantine room and/or outdoor areas to separate anyone who exhibits COVID-19 symptoms or who is determined to have come into close contact with a confirmed case. The isolation and quarantine rooms shall be separate rooms.
 - Isolation of students, employees, and visitors exhibiting symptoms of COVID-19 will occur without regard to vaccination and/or recent testing status.
 - Any students, staff, or visitors exhibiting symptoms should immediately be provided with and required to wear a surgical-grade or better face covering and should be directed to wait in the separate isolation area until they can be transported home or to a healthcare facility, as soon as practicable. For serious illness, call 9-1-1 without delay.
 - Students in the isolation and quarantine areas will be monitored by a staff member.
 - Parents/guardians will be required to pick up their students within one hour. Parents/guardians should take the student to get a COVID-19 test immediately and, if a student of MSA- 2, 3, 4, 6, or 8, should upload the test result to the LAUSD Daily Pass system or otherwise provide a copy to the school.
 - A log will be kept of all persons entering the isolation and quarantine areas.
 - Students will be grouped by stable group or class when possible in the quarantine area.
 - Physical distancing of six feet or greater will be maintained in the isolation and quarantine areas and **masking shall be required for any individual entering these areas.**
- Symptomatic individuals who test negative for COVID-19 can return 24 hours after resolution of fever (if any) and improvement in symptoms.
 - Documentation of a negative test result should be provided to school administrators.

⁴ Notice of potential exposure means any of the following: (a) notification from a public health official or licensed medical provider that an employee was exposed to a qualifying individual at the worksite; (b) notification from an employee, or their emergency contact, that the employee is a qualifying individual; (c) notification through the Charter School's testing protocol that the employee is a qualifying individual; or (d) notification from a subcontracted employer that a qualifying individual was on the school site. (Labor Code § 6409.6, subd. (d)(3).)

- In lieu of a negative test result, students and staff may return to work with a medical note by a physician that provides alternative explanation for symptoms and reason for not ordering COVID-19 testing.
- Symptomatic individuals who neither test for COVID-19 nor consult with a medical professional must isolate at home until fever free for 24 hours, improved symptoms, and 10 days from symptom onset.
- In the event of one or more confirmed COVID-19 case(s) the Charter School will follow the CDPH and local public health guidance, including implementation of the following practices:
 - The Charter School will provide notifications to the local public health department of any known case of COVID-19 among any student, employee, or visitor or other school-associated person who was present on a Charter School campus within the 14 days preceding COVID-19 symptoms, or 10 days before a positive test result.
 - MSA Los Angeles COVID-19 Compliance Officers will notify the Los Angeles County Department of Public Health of any COVID-19 hospitalizations or deaths among students or staff by sending a notification to ACDC-Education@ph.lacounty.gov.
 - Notifications will be provided by the Home Office COVID-19 Response Team depending on the county where the school is located.
 - For Los Angeles campuses: The COVID-19 Compliance Officer will instruct the individual who tested positive to follow the LACDPH COVID-19 Home Isolation instructions and will inform the positive case that LACDPH will contact them directly to collect additional information and to issue a Health Officer Order to quarantine.
 - All students and staff of MSA- 2, 3, 4, 6, and 8 campuses will be contacted by the LAUSD Community Engagement team to be instructed on isolation and to provide further information.
 - Site administrators of MSA- 2, 3, 4, 6, and 8 will report to LAUSD using the Initial Exposure Management (IEM) Reporter App, as detailed in the latest LAUSD IOC guidance on exposure management reporting.
 - The notification to the local public health department must include:
 - 1) The full name, address, telephone number, and date of birth of the individual who tested positive;
 - 2) The date the individual tested positive, the school(s) at which the individual was present on-site within the 10 days preceding the positive test, and the date the individual was last on-site at any relevant school(s); and
 - 3) The full name, address, and telephone number of the person making the report.

- For San Diego Charter School locations, the public health department should be notified either via phone at (888) 950-9905, or online at www.coronavirus-sd.com. The notification should list the following information: 1) The name of the person reporting, 2) the Charter School name and district, 3) the Charter School address, 4) your position at the Charter School. For the individual diagnosed with COVID-19, the notification should list the individual's: 1) Name, 2) date of birth, 3) contact information (phone number and email), 4) the individual's last date on the Charter School campus, and 5) any additionally relevant comments.
- For Los Angeles County Charter School locations: The Charter School will contact the LAC DPH as consistent with its "Protocol for COVID-19 Exposure Management Plan in K-12 Schools,"⁵ and either by:
 - 1) Using the LACDPH reporting portal, or:
 - <http://www.redcap.link/lacdph.educationsector.covidreport>
 - 2) Downloading and completing the COVID-19 Case and Contact Line List for the Education Sector and sending it to ACDC-Education@ph.lacounty.gov.
 - 3) Schools having difficulty reporting COVID-19 cases to LACDPH can call (833) 707-0319, Monday through Friday from 8 a.m. to 5 p.m.
- For Orange County Charter School locations: Contact the Orange County Public Health Department via phone at 714-834-8180, or via email at epi@ochca.com.
 - Notify all staff and families in the school community of any positive COVID-19 case while maintaining confidentiality as required by state and federal laws.
 - Close off areas used by any sick person and do not use before cleaning and disinfection.
 - Investigate the COVID-19 illness and exposures and determine if any work-related factors could have contributed to risk of infection.
 - Update protocols as needed to prevent further cases in accordance with CDPH Guidelines ("Responding to COVID-19 in the Workplace").
 - Implement communication plans for exposure at school and potential school closures in the event of an outbreak or other necessary circumstances, to include outreach to students, parents, teachers, staff and the community.

⁵This document may be found at:

http://publichealth.lacounty.gov/media/Coronavirus/docs/protocols/ExposureManagementPlan_K12Schools.pdf

- Include information for staff regarding labor laws, California Supplemental Paid Sick Leave, emergency paid sick leave and extended family and medical leave pursuant to the FFCRA, information regarding Disability Insurance, Paid Family Leave and Unemployment Insurance, as applicable to schools.
- Maintain regular communications with the local public health department.
- Recommend testing for all students, employees, and visitors in close contact with the confirmed COVID-19 case, consistent with recommendations from the CDPH and local public health departments.
- For all settings: Provide information regarding close contacts to the county public health department via secure fax or email.
- If the school site must be closed for in-person instruction, develop a contingency plan for continuity of education using independent study. Independent study shall include all of the following:
 - Confirmation or provision of access for all students to connectivity and devices adequate to participate in the educational program and complete assigned work;
 - Content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction;
 - Academic and other supports designed to address the needs of students who are not performing at grade level, or need support in other areas, such as English learners, students with exceptional needs, students in foster care or experiencing homelessness, and students requiring mental health supports;
 - Special education, related services, and any other services required by a student's individualized education program, with accommodations necessary to ensure that individualized education program can be executed in an independent study learning environment;
 - Designated and integrated instruction in English language development for English learners, including assessment of English language proficiency, support to access curriculum, the ability to reclassify as fully English proficient, and, as applicable, support for dual language learning;
 - Providing synchronous instruction as required by law.
 - "Synchronous instruction" means classroom-style instruction or designated small group or one-on-one instruction delivered in person, or in the form of internet or telephonic communications, and involving live two-way communication between the teacher and pupil. Synchronous instruction shall be provided by the teacher of record for that pupil pursuant to Section 51747.5.

- o For TK/K-3 opportunities must occur daily.
- o For 4-8 opportunities must occur weekly along with daily live interaction.
- o For 9-12 opportunities must occur weekly.
- o Can be classroom style, designated small group, or one-on-one.
- o The “teacher of record for that pupil” pursuant to Section 51747.5 is the assigned supervising teacher who must be an employee. There is not more than one supervising teacher.
 - Charter School will document each pupil’s participation in synchronous instruction.
 - Continuing to provide school meals.
- o Provide guidance to parents, teachers and staff reminding them of the importance of community physical distancing measures while a school is closed, including discouraging students or staff from gathering elsewhere.
- o If the COVID-19 case was present on the Charter School campus, the individual must be excluded from campus for at least 5 days from COVID-19 symptom onset, or if asymptomatic, 5 days from the date the specimen was collected for the positive COVID-19 test, as detailed below.
- In the event of a cluster (three or more cases within 14 days), the Charter School will contact local county public health officials, as necessary, and work closely with such officials to determine whether the cluster is an outbreak, requiring outbreak response.⁶
- In the event of an outbreak or cluster at a Charter School:
 - o The Charter School CTF and COVID-19 Compliance Officer will work closely with local county public health officials, timely provide all required information, and otherwise comply with all CDPH and local guidance regarding outbreaks.⁷
 - o The COVID-19 Compliance Officer for MSA Los Angeles campuses will immediately call the LACDPH at (833) 707-0319 or submit an online report at <http://www.redcap.link/lacdph.educationsector.covidreport>.

⁶ In the event of a “cluster,” Los Angeles County Charter Schools must specifically report such information to the LAC DPH at LADPH at ACDC-Education@ph.lacounty.gov or by calling (888) 397-3993.

⁷ In the event of an outbreak, all Charter School locations will comply with guidance titled “Management of Outbreaks of COVID-19,” issued by the LAC DPH. This protocol can be found at: http://publichealth.lacounty.gov/media/Coronavirus/docs/education/EMPSupplement_K12Schools.pdf. In the event that other state or local guidance provides more stringent outbreak protocol, the Charter School will comply with such protocol.

- The Charter School will notify students, families, employees, and stakeholders that the Charter School and local public health department are investigating a cluster and/or outbreak. The notice will encourage all stakeholders to follow public health recommendations.
- The Charter School will additionally notify all stakeholders if the school is to be closed for 14 days due to widespread and/or ongoing transmission of COVID-19 at the school or in the general community.
- The Charter School will identify absenteeism among those in affected classes and coordinate with the LHD to contact these absentees to screen for symptoms of COVID-19 if they were exposed to a case during the case's infectious period.
- Limit visitors to the affected Charter School campus, except for those that are essential to the Charter School's mission. Law Enforcement Personnel (Sheriff and Police), Fire, Medical, Emergency, or government employees who are responding to, working at, or inspecting the facility will be allowed to access the Charter School campus.
- Discontinue all non-essential in-person group activities at the Charter School Campus during the outbreak.
- Identify absenteeism among affected classes and contact those absentees to screen for COVID-19 symptoms.
- Close Contacts and Quarantine
 - A "Close Contact" is spending a total of fifteen minutes or more over a 24-hour period within 6 feet of an infected person or, in Los Angeles County, having had unprotected contact with the infected person's body fluids and/or secretions of a person with confirmed COVID-19 (e.g., being coughed or sneezed on, sharing utensils or saliva, or providing care without using appropriate protective equipment).
 - An individual will only be considered a close contact if the Charter School is reasonably sure that they meet the above definition. Individuals will not be deemed a close contact solely because they were in the same classroom or school group as a confirmed COVID-19 case, regardless of actual proximity to the confirmed case.
 - "Fully vaccinated" refers to those who have received either a single dose vaccine or the second dose of a two-dose vaccine over two weeks ago.
 - For Los Angeles Campuses: when notifying any individual that they are a close contact of a positive case, the COVID-19 Compliance Officer will provide that individual with a copy of the LACDPH Public Health Emergency Quarantine Order. Notifications that an individual is a close contact will also contain all messages required to be included pursuant to the LACDPH K-12 Exposure Management Plan guidance.
 - *Quarantine exemptions for all MSA campuses.*

quarantine at home during an outbreak. Students undergoing modified quarantine must eat six feet from other students. Modified Quarantine may end after the Day 7 from exposure if the second test taken during quarantine is performed on or after Day 5 from exposure and is negative and the student remains asymptomatic.

- Students at MSA Santa Ana and San Diego are strongly encouraged to but not required to mask during modified quarantine.
 - Standard Quarantine. If an individual is not exempt from quarantine and either cannot or will not follow all of the requirements for modified quarantine, they must quarantine at home for 10 days following exposure, or for 5 days following exposure if a negative test is taken on Day 5 and the individual remains asymptomatic.
 - If any symptoms develop during the 10-day period after exposure under any type of quarantine, the exposed person must immediately isolate, get tested, and contact their healthcare provider with any questions regarding their care. Any individual who is under any type of quarantine should wear a well-fitting medical grade mask when around others for 10 days from their exposure to a positive case.
- *Modified Quarantine for individuals not exempt from quarantine at MSA 2, 3, 4, 6, and 8*
- Individuals who are identified as close contacts may participate in modified quarantine, in which exposed students and employees continue to attend school in-person unless they develop symptoms or test positive.
 - Modified quarantine can only be considered if:
 - The exposure occurred in a TK-12 setting. Students at Early Education Centers and Adult School programs are not eligible for modified quarantine and must quarantine at home if they are exposed to a positive case.
 - The exposure occurred in a school setting where students were supervised by school staff (i.e. classroom, school grounds with school staff present, school bus, etc.). Close contacts with exposure to infection at home are not eligible for modified quarantine, unless they are exempt from quarantine based on vaccination status or recent recovery from infection.
 - The school can verify that both the infected individual and the individual identified as a close contact were mask compliant during

the entire period of exposure, including outdoor exposure (masks must have been completely covering the individuals' nose and mouth). Students with face mask accommodations are not allowed to participate in modified quarantine. School administrators will report on mask compliance for each close contact when submitting IEM Reports using the IEM Reporter App.

- The exposure occurred in a school that does not have a confirmed active outbreak, as determined by LACDPH. An outbreak is when significant transmission (confirmed epidemiologically-linked cases) has occurred at a school within a 14-day period. Schools with confirmed outbreaks may not implement modified quarantine.
- Students eligible to participate in modified quarantine will appear as "Allowed" in the Principal's Daily Pass Dashboard and will be allowed to generate a Daily Pass QR code. These students will also be identified in a "Watch" column in the Daily Pass Dashboard Cases tab, to indicate to Site Administrators they are under modified quarantine protocols.
- Individuals in modified quarantine must be asymptomatic. All students will be required to respond to the Daily Pass health screening questions. Symptoms must be monitored daily, and if symptoms develop, the student cannot continue to participate in modified quarantine. Symptomatic close contacts must isolate at home and get tested immediately, preferably at a LAUSD testing site.
- Students who are participating in modified quarantine should be given the opportunity to participate in the full instructional program during the school day, including recess and lunch time. However, the school must not allow students in modified quarantine to participate in extracurricular activities, including sports, clubs, Beyond the Bell, and other before and after school care or programming. The modified quarantine is meant to let students continue learning during the instructional day but does not cover other activities outside of the regular school curriculum. Students must leave campus after school and go directly home.
- Individuals in modified quarantine must wear a surgical-style mask or higher PPE at all times on school grounds except when they are

- eating or drinking. The school site should make arrangements and ensure students in modified quarantine are distanced 6 feet during meal periods when masks are removed. School sites will provide upgraded masks to students in modified quarantine if needed.
- Individuals in modified quarantine must test on or around Day 5 and twice per week for the duration of the quarantine period. Tests can be either a rapid antigen test or a PCR test. The first test should be conducted at initial exposure or as soon as possible after the exposure (Day 1); the second test must be on or after Day 5, so that the individual can be released from quarantine on Day 6 if they test negative.
 - If all of these criteria are not met, modified quarantine is not available.
- *Standard Quarantine for individuals at MSA 2, 3, 4, 6, and 8.*
 - Individuals who are not exempt from quarantine and do not qualify for modified quarantine are subject to standard quarantine if they are a close contact of an individual who tests positive for COVID-19. These individuals must complete a ten-day quarantine and return on day eleven if they remain asymptomatic for the duration of quarantine unless the exposed individual ends quarantine sooner by receiving a negative result on a test taken on or after the fifth day from exposure.
 - Individuals undergoing quarantine who get tested for COVID-19 on or after the fifth day from exposure to the confirmed case may return to school on Day 6 once proof of a negative test is submitted through the Daily Pass system, but must wear a surgical mask when around others and continue to self-monitor for symptoms through day 10 from exposure. Students will be cleared to return to school through the Daily Pass system.
 - Individuals at MSA 2, 3, 4, 6, and 8 who complete their quarantine period will be cleared to return to school via the Daily Pass system.
 - All asymptomatic close contacts that have quarantined due to potential exposure will be able to test at any COVID-19 test site or with a mobile testing team, so long as they remain asymptomatic.
 - All staff and students of Los Angeles campuses who are close contacts of a positive case but remain on campus due to quarantine exemption or modified quarantine must be tested on Day 5 after the date of last exposure, regardless of vaccine or booster status.

- *MSA 2, 3, 4, 6, and 8 Quarantine Guidelines for Household Close Contacts*
 - Individuals with continuous exposure to a sibling or household member who tests positive must remain at home for a minimum of 10 days following the date of the household member's positive test. These individuals are not eligible for modified quarantine, unless they are exempt from quarantine due to vaccination status or recent infection.
 - Household close contacts must stay at home for the duration of the positive household member's isolation period. Close contacts then begin their official 10-day quarantine on the date that the positive individual's isolation ends (e.g. if the household positive's isolation period ends on Day 6 due to a negative test on Day 5, this would be the individual's Day 1).
 - Close contacts should test on or after Day 5 of their official quarantine period to return to school or work on Day 6.
 - Positive household members must consistently wear an upgraded, surgical-style mask at home for a full 10 days following the date of their positive test, even if they are allowed to return to school or work on Day 6. If this condition cannot be met, the household close contact must delay the start of their official quarantine until Day 11.
- Quarantine rules for all employees are stated in the COVID-19 Injury and Illness Prevention Program ("IIPP") addendum.
- For individuals who test positive for COVID-19:
 - Checking for false positives on Los Angeles Unified School District Sites only (MSA-2, 3, 4, 6 and 8):
 - To reduce unnecessary anxiety and isolation/quarantine of students and staff, the Charter School shall re-test asymptomatic individuals who have tested positive for COVID-19 as required by the Los Angeles Unified School District.
 - If an individual (student or staff) receives a positive test result, the Los Angeles Unified School District Community Engagement Team will contact the individual to conduct an interview and confirm whether he or she has symptoms consistent with COVID-19.
 - *Symptomatic Positive Case.* If the individual is determined to be symptomatic, has a known exposure to a positive case, and/or is in a high prevalence setting (i.e., a campus with more than one active case), the Los Angeles Unified School District Community Engagement Team will direct the individual to isolate for at least 5 days per the latest CDPH isolation guidance and quarantine all close contacts per Los Angeles County Department of Public Health guidelines.

- *Asymptomatic Positive Case.* If the individual is determined to be asymptomatic, has no known exposure, and is in a low prevalence setting (i.e., a campus with more than one active case), the individual will be asked to isolate, and all close contacts will be asked to quarantine. The individual will be directed to re-test within 48 hours of the positive sample collection.
- If the confirmatory test returns a negative result, the Los Angeles County Department of Public Health will approve the false positive request and report it to the State of California. The individual is thereafter released from isolation and all close contacts are released from quarantine. The Los Angeles Unified School District Community Engagement Team will then deactivate the positive case and be permitted to access District sites again.
- If the confirmatory test returns a positive result, the Los Angeles Unified School District Community Engagement Team will direct the individual to isolate for at least 5 days per the latest CDPH guidance and all close contacts will continue to quarantine per Los Angeles County Department of Public Health guidelines. The individual will not be permitted to access district owned sites in the meantime.
- Checking for false positives at all other MSA campuses:
 - If an individual (student or staff) receives a positive test result, the COVID-19 Home Office Response Team will contact the individual to conduct an interview and confirm whether he or she has symptoms consistent with COVID-19.
 - All students and staff who test positive for COVID-19 and are determined to be asymptomatic will be strongly encouraged to re-test within 48 hours of the initial positive sample collection.
 - If the confirmatory test is negative the COVID-19 Home Office Response Team will alert the local public health department to the false positive and will release the individual from isolation and will alert all known close contacts that they may cease quarantining.
 - If the confirmatory test is positive, the individual shall continue to isolate and all close contacts shall continue to quarantine.
- Persons with COVID-19 may discontinue [self-isolation](#) under the following conditions:
 - At least 5 days have passed since symptom onset or, if asymptomatic, since their positive test; AND

- At least 24 hours have passed since resolution of fever without the use of fever-reducing medications; AND
 - Other symptoms have resolved or are improving; AND
 - An FDA authorized COVID-19 viral test (antigen preferred) test taken on or after Day 5 from symptom onset is negative.
 - NOTE: If fever reduction, improvement of other symptoms, or a negative test are not all achieved, isolation may not end until after Day 10 from symptom onset or, if asymptomatic, their positive test, so long as 24 hours have passed since resolution of fever and all other symptoms are not present or are improving.
 - Note: For staff, per CAL/OSHA COVID-19 Prevention ETS, testing that is required for employees must be provided by the employer free of charge and during work hours; these tests may not be self-administered or self-read unless they are observed by the employer or an authorized telehealth proctor.
- No matter when isolation ends, all students and staff recovering from COVID-19 must wear a highly protective non-cloth mask when around others for a full 10 days from testing positive or onset of symptoms.
- The School will comply with Cal/OSHA regulations regarding when employees may return to work after exposure, as detailed in the Charter School’s IIPP addendum.
- Subsequent School Closure Criteria:
 - Charter School campuses that are open for in-person instruction may subsequently and temporarily close for in-person instruction based on the following criteria:
 - As determined by and in consultation with the local health department
 - After closure, the Charter School may reopen after 14 days, cleaning, disinfection, conclusion of a public health investigation, and local health department consultation.
- **Group Tracing** Until further notice, and as recommended by the CDPH all MSA schools shall have the option to utilize the “group tracing” method of exposure management in place of individual contact tracing to track exposures during the Omicron variant surge, as follows:
 - Schools will notify students who spent more than a cumulative total of 15 minutes (within a 24-hour time period) in a shared indoor airspace (e.g., classroom) with someone with COVID-19 during their period of infectiousness.
 - Notification should occur to “groups” of exposed students (e.g., classmates, teammates, cohorts, etc.) rather than contact tracing to identify individual “close contacts” (e.g., those within 6 feet).

- Notifications should be provided to all individuals considered exposed, including those who are vaccinated and/or recently infected.
- Exposed students, regardless of COVID-19 vaccination status or prior infection, are strongly encouraged to be tested for COVID-19 with at least one diagnostic test obtained within 3-5 days after last exposure. Any FDA-approved antigen diagnostic test, PCR diagnostic test, or pooled PCR test is acceptable for evaluation of an individual's COVID-19 status. Individuals who have been recently infected should use antigen testing.
- Exposed Students who participate in testing may continue to take part in all aspects of K-12 schooling, including sports and extracurricular activities, unless they develop symptoms or test positive for COVID-19.
- All exposed students, regardless of vaccination status or previous infection, are strongly recommended to remain fully masked indoors and outdoors, unless actively eating or drinking, when around other through day 10 from their last exposure date. Eating and drinking should occur distanced from others. Exposed students will also need to remain masked at all times during sports and extracurricular activities.
 - Students are strongly encouraged but not required to mask following an exposure.

6. Sanitizing/hygiene materials and practices:

- The Charter School will develop plans and routines to ensure that students and staff wash or sanitize hands frequently, including upon arrival to campus, after using the restroom, after playing outside and returning to the classroom, before and after eating, and after coughing or sneezing.
- Staff will teach and reinforce proper handwashing technique, avoiding contact with one's eyes, nose, and mouth, using a tissue to wipe the nose, and covering coughs and sneezes.
- The Charter School shall make soap, tissues, no-touch trashcans, face coverings, water and paper towels or dryers for hand washing available. Students and staff should wash their hands for 20 seconds with soap, rubbing thoroughly after application. Soap products marketed as "antimicrobial" are not necessary or recommended.
- Trash cans will be placed near restroom doors and students and staff will be instructed to use a paper towel to prevent touching the handle with their hands.
- A restroom will need to be dedicated for individuals in the isolation area. This restroom must be cleaned and sanitized before other occupants may use it.
- If handwashing stations near classrooms are not practicable, and to facilitate use by students and staff as needed, the Charter School shall make available fragrance-free alcohol-based hand

sanitizer that is at least sixty percent (60%) ethyl alcohol. (Note: frequent handwashing is more effective than the use of hand sanitizers). This hand sanitizer will be made available to both students and staff at all strategic locations throughout the Charter School Campus.

- The Charter School will not use hand sanitizer with isopropyl alcohol as the main ingredient.
- Children under age 9 should only use hand sanitizer under adult supervision. Call Poison Control if consumed: 1-800-222-1222.
- Children under age 9 should only use hand sanitizer under adult supervision. Hand sanitizer will also not be left out in the open in classrooms for students under the age of 9.
- The Charter School shall place posters conspicuously that encourage hand hygiene to help stop the spread of COVID-19.
- Employees should visit the CDC's coughing and sneezing etiquette and clean hands webpage for more information.

7. Routine cleaning and disinfecting: The Charter School will maintain a high level of cleanliness throughout the year to help reduce the risk of exposure to and spread of COVID-19 at the school site. In general, cleaning once a day is usually enough to sufficiently remove potential virus that may be on surfaces. Disinfecting (using disinfectants on the [U.S. Environmental Protection Agency COVID-19](#) list) removes any remaining germs on surfaces, which further reduces any risk of spreading infection.

- Custodial staff will perform routine and thorough cleaning once per day, and when students are not present. When cleaning, the space will be aired out before children arrive.
- Routine cleaning practices include, but are not limited to:
 - Using everyday janitorial cleaning supplies and disinfectants for surfaces as floors, tables, desks, counters, sinks, toilets, and other hard-surfaced furniture and equipment;
 - Dusting hard surfaces;
 - Damp wiping of hard surfaces to ensure they are free of debris;
 - Wet mopping of floors;
 - Vacuuming carpets and mats.
- Health Office areas, including the general health office, isolation area, and quarantine area, may require more frequent cleaning and rapid response, as needed.
- Student restrooms will be serviced at least twice a day and will be fully cleaned and disinfected using electrostatic equipment by the night cleaning crew once per day.
- The Charter School will clean and disinfect areas commonly visited by staff no less than once per day during operating hours and implement a schedule for such cleaning and disinfecting. These areas include, but are not limited to: Break rooms, restrooms, lobbies, classrooms, laboratories, nurse's office, counseling and student support areas, staff offices, and cafeterias.

- The Charter School will clean high touch areas in staff breakrooms at least once per day.
- Cleaning and Disinfection after a Confirmed Case on Campus:
 - If an individual confirmed to have COVID-19 was on campus, the Charter School will complete enhanced cleaning and disinfection procedures in the spaces occupied by the confirmed COVID-19 case.
 - Employees completing this cleaning must wear a mask and gloves at all times and will refer to Material Safety Data Sheets or follow the instructions on the chemical labels.
 - When disinfecting, the Charter School will use an EPA-registered disinfectant that is approved for emerging pathogens.
 - Custodians will focus on immediate areas occupied by the confirmed COVID-19 case.
 - Custodians will clean and disinfect:
 - All non-porous surfaces in the ill occupant's space/office, as well as on shared equipment (like tablets, touch screens, keyboards, remote controls) in bathrooms and shared spaces used by the ill person. Cleaning and disinfection will also focus on high-touch surfaces (e.g. desk, table, hardbacked chair, doorknob, light switch, handle, computer, keyboard, mouse, telephones).
 - On porous surfaces (e.g., carpets, chairs) in the confirmed COVID-19 case's space or office, custodians will remove visible contamination, clean with appropriate cleaners, and disinfect with a liquid/spray indicated for use on the material.
 - The space(s) where the confirmed COVID-19 case was present may be reoccupied once these cleaning and disinfection procedures have been completed.
- The Charter School will ensure proper ventilation during all cleaning and disinfecting. Staff are encouraged to introduce fresh outdoor air as much as possible, by opening windows where practicable.
- The Charter School will comply with [CDPH Guidance on Ventilation of Indoor Environments and Ventilation and Filtration to Reduce Long-Range Airborne Transmission of COVID-19 and Other Respiratory Infections: Considerations for Reopened Schools](#) to the greatest extent practicable for each facility.
- All frequently touched surfaces in the workplace, such as chairs, desks, tables, keyboards, telephones, handrails, light switches, sink handles, restroom surfaces and door handles, will be routinely cleaned.
- Staff will be trained as appropriate in the chemical hazards, manufacturer's directions, and Cal/OSHA requirements for safe and correct application of cleaning and disinfectant agents in accordance with the Healthy Schools Act guidance from the California Department of Pesticide Regulation and Cal/OSHA.

- When choosing disinfecting products, the Charter School will use those approved for use against COVID-19 on the Environmental Protection Agency (EPA)- approved list “N” and require staff to follow product instructions. MSA-2, 3, 4, 6, and 8 will use disinfectants from the LAUSD's List of Approved Hand Sanitizers and Disinfectants.
 - To reduce the risk of asthma and other health effects related to disinfecting, the Charter School will select disinfectant products on list N with asthma-safer ingredients (hydrogen peroxide, citric acid or lactic acid) as recommended by the US EPA Design for Environment program.
 - The Charter School will avoid products that contain peroxyacetic (peracetic) acid, sodium hypochlorite (bleach) or quaternary ammonium compounds, which can cause asthma.
 - Staff shall follow label directions for appropriate dilution rates and contact times.
 - The Charter School will establish a cleaning and disinfecting schedule in order to avoid both under- and over-use of cleaning products.

Subject to available resources, disposable disinfecting wipes shall be made available so that employees can wipe down commonly used surfaces (e.g., doorknobs, keyboards, remote controls, desks, other work tools and equipment) before each use. Disinfectant wipes and sprays will be kept away from students.

8. Facility measures: The Charter School will incorporate CDE guidance measures for maintaining a healthy facility, to include some or all of the following:

- Maintenance staff will regularly inspect and test ventilation systems and fans to confirm they operate properly and will increase circulation of outdoor air as much as possible by opening windows and doors and other methods.
- Windows and doors should not be opened if doing so poses a safety or health risk by exacerbating seasonal allergies or asthma symptoms.
 - The Charter School will consider alternatives, such as increased central air filtration (targeted filter rating of at least MERV 13) if opening windows poses a safety or health risk to persons using the facility.
- HVAC systems will be set to maximize indoor/outdoor air exchanges unless outdoor conditions (recent fire, high outdoor temperature, humidity, and pollen levels) make this inappropriate.
- If an HVAC system becomes nonoperational, additional ventilation should be provided with the use of fans or relocating classes until repairs are completed.
- The COVID-19 isolation and quarantine areas should be outdoors when feasible to maximize ventilation and minimize exposures to COVID-19 infection. Under no

circumstances should an isolation or quarantine area be in a room without a functioning HVAC system.

- Maintenance staff will ensure that all water systems and features (e.g., drinking fountains) are safe to use after a prolonged facility shutdown to minimize the risk of Legionnaires' disease and other diseases associated with water.
- Consider installing additional temporary handwashing stations at all school entrances and near classrooms to minimize movement and congregation in bathrooms.
- Consider installing privacy boards or clear screens to increase and enforce separation between staff and students.

9. Physical distancing: The Charter School will incorporate CDPH and CDE guidance with respect to physical distancing between students on campus as much as is feasible, including maximizing physical distance as much as possible while eating (especially indoors), using additional spaces outside of the cafeteria for mealtime seating such as classrooms or the gymnasium can help facilitate distancing, and arrange for eating outdoors as much as feasible.

- In areas where physical distancing is not feasible, clear plastic or solid surface barriers that can be cleaned often may be used.
- Employees will be encouraged to eat outdoors. They may also eat at their desk or cubicle if these areas are enclosed as a separate room, provide more distance, or include barriers.

10. Extracurricular Activities:

- All extracurricular activities operated by or supervised by school personnel or occurring on a school site, whether or not occurring during school hours, will be undertaken in compliance with this policy and all required public health measures applicable to K-12 schools. This applies to sports, band, chorus, clubs, and other similar activities and organizations. All MSA campuses will operate and supervise extracurricular activities in compliance with the latest California Department of Public Health K-12 guidance and any other relevant state or county guidance on sports and extracurricular activities.
- MSA Los Angeles sports programs will observe all required elements of the most updated version of the Los Angeles County Department of Public Health's "COVID-19 Exposure Management Plan Guidance, Youth Recreational Sports Programs" and the Los Angeles County Department of Public Health's "Protocol for Organized Youth Sports: Appendix S" in addition to any future binding guidance applicable to K-12 youth sports programs.
 - Each Los Angeles campus's COVID-19 Compliance Officer shall fulfill the duties of the COVID-19 Organized Youth Sports Program Compliance Officer, as those duties are described in LACDPH's sports-related COVID-19 guidance.

- Each Los Angeles campus's COVID-19 Compliance Officer shall ensure that the required LACDPH youth sports exposure management protocols are followed in accordance with current guidance.
- Each Los Angeles campus's COVID-19 Compliance Officer shall ensure that all mandatory testing required by the LACDPH's youth sports guidance is conducted in accordance with current guidance.
- All MSA extracurricular programs will keep updated rosters of all participating students and staff to facilitate identification of close contacts.
- Students of MSA 2, 3, 4, 6 and 8 will not be permitted to participate in extracurricular activities starting October 31, 2021, unless they provide proof of COVID-19 vaccination through the Daily Pass system.
- Indoor mask use remains an effective layer in protecting against COVID-19 infection and transmission, including during sports, music, and related activities, especially activities with increased exertion and/or voice projection, or prolonged close face-face contact. Accordingly:
 - Masks are strongly recommended indoors at all times for teachers, referees, officials, coaches, and other support staff.
 - Masks are strongly recommended indoors for all spectators and observers.
 - Masks are strongly recommended indoors at all times when participants are not actively practicing, conditioning, competing, or performing. Masks are also strongly recommended indoors while on the sidelines, in team meetings, and within locker rooms and weight rooms.
 - When actively practicing, conditioning, performing, or competing indoors, masks are strongly recommended by participants even during heavy exertion, as practicable. Individuals using instruments indoors that cannot be played with a mask (e.g., wind instruments) are strongly recommended to use bell coverings and maintain a minimum of 3 feet of physical distancing between participants. If masks are not worn (or bell covers are not used) due to heavy exertion, it is strongly recommended that individuals undergo screening testing at least once weekly, unless they had COVID-19 in the past 90 days. An FDA-authorized antigen test, PCR test, or pooled PCR test is acceptable for evaluation of an individual's COVID-19 status.

11. Use of Face Coverings: The Charter School will follow CDPH, CDE and CDC guidance and state and local health orders on the use of face coverings. All staff are encouraged to review the

CDPH and CDC guidance on cloth face coverings; face coverings must be used in accordance with CDPH Guidance and this Policy unless a person is subject to exemption.

- All MSA students are strongly recommended but no longer required to wear a face mask when indoors at any Charter School Campus building, bus, or other enclosed space. Individuals must still wear masks when entering a Nurse's office, COVID-19 testing site, symptom and wellness check area, isolation or quarantine area, or other medically sensitive area.
- No person at any MSA campus can be prevented from wearing a mask as a condition of participation in an activity or entry into the school site unless wearing a mask would pose a safety hazard.
- Charter School employees at the Home Office—which is not a school site—are permitted to forego indoor masking so long as the Charter School performs all verifications required under Section 4(c) of the current LACDPH Order of the Health Officer (2/23/2022).
- Face masks—to the extent they are required—are required without regard to vaccination status.
- Face masks and face shields, if required, may be removed for meals, snacks, naptime, showers, or outdoor recreation, or when needing to be replaced. When any type of face covering is temporarily removed, it should be placed in a clean paper bag (marked with the student's name and date) until it needs to be put on again.
- The Charter School will provide face coverings for students and staff who lose their face coverings or forget to bring them to school.
- Employees should wear a clean face mask to work every day if still required to wear one.
- Employees are expected to teach and reinforce proper use of face coverings, and in limited circumstances, face shields.
- The Charter School will post signs regarding the need for, proper use, removal, and washing of face coverings and shall educate students, particularly younger elementary school students, on the rationale and proper use of face coverings.
- When pedagogically necessary, Teachers still subject to an indoor face mask requirement may use clear plastic face shields with an appropriate seal (cloth covering extending from the bottom edge of the shield and tucked into the shirt collar) or transparent masks in certain limited situations in the classroom to enable students to see their faces and avoid potential barriers to phonological instruction as long as the wearer maintains physical distance from others to the extent practicable. Staff must return to wearing their normal surgical-grade face covering at all other times, unless otherwise exempted.
- The Charter School will evaluate any employee's request for accommodation from the Charter School's facial covering policy/requirement pursuant to the MPS Employee

Handbook and applicable law for all lawfully recognized accommodations. Employees requesting an accommodation from the facial covering policy/requirement must provide appropriate documentation and contact human resources.

- Per Los Angeles County Department of Health Guidance, employees based in Los Angeles County who are granted exemptions from wearing a mask while indoors must undergo COVID-19 testing at least twice per week, unless the employee provides proof of full vaccination against COVID-19 and proof of receipt of any vaccine booster to which the employee is eligible.
- Accommodations for students:
 - Pursuant to CDPH Guidance on the use of face masks, individuals with a medical condition, mental health condition, or disability that prevents wearing a mask are to be accommodated with an exemption from mask wearing. This includes those who are hearing impaired as well as those who communicate with the hearing impaired.
 - If a student cannot wear a mask due to a medical condition, mental health condition, or disability, he or she should wear the next most effective alternative that can be tolerated, such as a transparent face shield with a cloth draping sealing the bottom.
 - Parents/guardians who believe their student may need an accommodation from the Charter School's facial covering policy and requirement should contact the Charter School principal.
 - Upon receipt of appropriate documentation, the Charter School will evaluate requests for accommodation and determine what, if any accommodations the Charter School can provide.
 - Assessment of whether a medical condition, mental health condition, or disability warrants a mask accommodation is a medical determination that must be made by a physician, nurse practitioner, physician assistant. Self-attestation and parental attestation for mask exemptions due to the aforementioned conditions do not constitute medical determinations.
 - Students exempted from wearing a mask or face shield, where they are still required, are strongly encouraged to be vaccinated against COVID-19 and to receive boosters when eligible and to be tested for COVID-19 at least twice a week. If a student is exempt from wearing any type of face covering and is not vaccinated, the Charter School shall implement physical distancing and other isolation measures to the greatest degree feasible.

12. Use of Gloves and Personal Protective Equipment: The Charter School is no longer required by emergency public health orders to require the use of gloves and personal protective equipment. Any employee or student who wishes to wear gloves and/or personal protective equipment beyond the required facial coverings may do so, provided that they dispose of them safely and appropriately and do not wear gloves or personal protective equipment of a type or in a manner that interferes with their ability to perform their duties. Upon request, the Charter School will provide gloves, a face mask, protective gown, and a medical grade mask to any employee dealing with sick children, performing cleaning or disinfection, providing instruction to any students with a face mask exemption, or where there is an otherwise heightened likelihood of contact with respiratory secretions or other bodily fluid.

13. Support for Students at Increased Risk of Becoming Infected or Unrecognized Illness. Pursuant to state and local health guidance, the Charter School has developed the following measures to mitigate the risk of COVID-19 to vulnerable student groups:

- The Home Office COVID-19 Response Team or designee will review student health plans, including 504 Plans, to identify students who may need additional accommodations to minimize potential exposure.
- The Home Office COVID-19 Response Team or designee will develop a process for engaging families for potentially unknown concerns that may need to be accommodated.
- The Charter School will identify additional preparations for classroom and non-classroom environments as needed to ensure the safety of students at increased risk of becoming infected or having unrecognized illness. Persons who might be at increased risk of becoming infected or having unrecognized illness include the following:
 - Individuals who have limited mobility or require prolonged and close contact with others, such as direct support providers and family members;
 - Individuals who have trouble understanding information or practicing preventive measures, such as hand washing and physical distancing; and
 - Individuals who may not be able to communicate symptoms of illness.
- The Charter School is prepared for opening to provide Free Access to Public Education (“FAPE”) in the least restrictive environment (“LRE”) for each student. All students with disabilities will receive services according to their IEP. In accordance with IDEA, it is critical to reinforce the understanding that students receiving special education services, or 504 accommodations are general education students first. Balancing the educational needs with the health and well-being of students and staff is our top priority.
- Every child and adolescent with a disability is entitled to FAPE and is entitled to special education services based on their individualized education program (IEP). The Charter School

continuously review and problem solve to balance safety and service needs. In order to provide the required level of safety, systems, processes and service delivery models have been reviewed. Adherence to social distancing guidelines will be followed as feasible except for instances when the services outlined in a specific IEP call for closer proximity. This will be evaluated on a case-by-case basis. For example, additional provision of PPE supplies to staff (gloves, gowns, face shields and Plexiglas dividers) who are required to deliver hand-over-hand instruction or hygiene service needs for students.

- Evaluations and Timelines:
 - All IDEA/ADA compliance timelines will be followed on schedule and in accordance with IDEA/ADA regulations. IEP Team meetings and 504 meetings that were missed due to the March school facility closures will be rescheduled and conducted as soon as possible, if not already conducted. All IEP team meetings and 504 meetings will be conducted virtually until the use of school facilities return to normal operations.
- Services:
 - The IDEA allows for flexibility in determining how to meet the individualized needs of students receiving special education services. State guidelines for the delivery of special education and related services will be implemented while protecting the health and safety of students as well as the individuals providing the services.
 - If a student is unable to access their education in person due to medical or other circumstances, including the inability to wear a face covering, alternative means of delivering these services will be provided.
 - The Charter School will provide appropriate protective equipment relative to the responsibilities of all Support Service Staff and disability needs.
 - All Staff and students will receive training on the appropriate use of PPE and healthy hygiene practices that are proven to mitigate the spread of COVID-19.
- The Charter School will identify additional preparations for classroom and non-classroom environments as needed to ensure the safety of students at increased risk of becoming infected or having unrecognized illness. Persons who might be at increased risk of becoming infected or having unrecognized illness include the following:
 - Individuals who have limited mobility or require prolonged and close contact with others, such as direct support providers and family members;
 - Individuals who have trouble understanding information or practicing preventive measures, such as hand washing and physical distancing; and
 - Individuals who may not be able to communicate symptoms of illness.

14. COVID-19 Vaccination Policy for Employees. The Charter School has adopted the following COVID-19 employee vaccination policy (“Employee Vaccination Policy”). The purpose of this Employee Vaccination Policy is to protect the health, safety, and well-being of all Charter School employees, students, families, and stakeholders to the maximum extent possible, and to facilitate a safe and meaningful return to in-person instruction. The Charter School drafted this policy in compliance with all applicable federal and state laws, including guidance from the Equal Employment Opportunity Commission (“EEOC”), Centers for Disease Control and Prevention (“CDC”), the California Department of Public Health (“CDPH”), and local health authorities.

- Pursuant to the California “State Public Health Officer Order of August 11, 2021,” (“Order”) all employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MSA -1, 5, Santa Ana, and San Diego campuses must either provide the School with proof of COVID-19 vaccination status or test for COVID-19 at least once per week. For employees, this directive is a condition of both employment and continued employment.
- Pursuant to the LAUSD’s “COVID-19 Vaccination Requirement for Employees and Other Adults Working at District Facilities” document issued August 13, 2021, all employees, contractors and other adults providing services at any MSA-2, 3, 4, 6, and 8 campuses must be fully vaccinated against COVID-19 no later than October 15, 2021. This directive is a condition of both employment and continued employment.
- Pursuant to the LAUSD’s December 16, 2021 communication, the LAUSD employee vaccine mandate will apply to all LAUSD authorized sites which includes MSA-7.
- **Proof of COVID-19 Vaccination:**
 - Consistent with applicable law, the Charter School will only accept the following forms of proof of COVID-19 vaccination:
 - COVID-19 Vaccination Record Card (issued by the Department of Health and Human Services Centers for Disease Control & Prevention or WHO Yellow Card) which includes name of person vaccinated, type of vaccine provided and date last dose administered); OR
 - A photo of a Vaccination Record Card as a separate document; OR
 - A photo of the client's Vaccination Record Card stored on a phone or electronic device; OR
 - Documentation of COVID-19 vaccination from a health care provider; OR
 - Digital record that includes a QR code that when scanned by a SMART Health Card reader displays to the reader client name, date of birth, vaccine dates and vaccine type; OR

- Documentation of vaccination from other contracted employers who follow these vaccination records guidelines and standards.
 - Any MPS employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MPS campus who either fails to provide proof of COVID-19 or provides proof of vaccination that is not consistent with the above-referenced acceptable forms of proof will be deemed unvaccinated.
 - Employees may their submit proof of COVID-19 vaccination to the MPS Human Resources Department.
 - The Charter School will securely maintain the confidentiality of employee COVID-19 vaccination data in strict compliance with all applicable legal authority.
- **COVID-19 Employee Testing:**
 - Pursuant to the Order, all MPS employees, volunteers, contractors, vendors or any other adult supporting Charter School functions on any MSA-1, 5, 7, Santa Ana, and San Diego campuses who are either unvaccinated or incompletely vaccinated must undergo COVID-19 testing (PCR only) at least once per week.
 - Previous history of COVID-19 from which the individual recovered more than ninety (90) days earlier, or a previous positive antibody test for COVID-19, do not waive this requirement for testing.
 - As outlined above, all employees at any MSA-2, 3, 4, 6, and 8 campuses must test for COVID-19 at least once per week, regardless of COVID-19 vaccination status, as directed by the LAUSD.
- **Accommodations:** Employees may request an accommodation from COVID-19 vaccinations and/or COVID-19 testing due to a medical issue or sincerely held religious belief, practice or observance that may prevent an employee from vaccinating or testing for COVID-19. Upon receiving a request for accommodation from COVID-19 testing and/or vaccinations, the Charter School will engage in the interactive process and determine what, if any accommodations can be provided. However, the Charter School may not be required to provide an employee with an accommodation, should it result in a direct threat to health and safety at the School or to the employee or if the accommodation will cause an undue hardship for the School, among other reasons.
- **Compliance Period:**
 - Employees at the MSA -1, 5, Santa Ana, and San Diego campuses must submit proof of COVID-19 vaccination to the Charter School before October 15, 2021. Such employees who fail to submit proof of COVID-19 vaccination before this date will be deemed unvaccinated and must be required to test for COVID-19 at least once per week. On or after October 15, 2021, employees to fail to test for COVID-19 will be

- deemed in non-compliance with this policy, absent an approved, legally recognized accommodation from such testing.
- Employees at MSA-2, 3, 4, 6, and 8 campuses must submit proof of COVID-19 vaccination to the Charter School before October 15, 2021. Such employees who fail to submit proof of COVID-19 vaccination before this date will be deemed in non-compliance with this policy, absent an approved, legally recognized accommodation from such testing.
 - Employees at MSA-7 must submit proof of vaccination to the Charter School at a time to be determined by the LAUSD.
- **Non-Compliance:**
 - Any employee deemed to be in non-compliance with this policy may be subject to disciplinary action, up to and including termination from at-will employment.
 - The Charter School reserves the right to refuse entry to campus to any volunteer, vendor, contractor other adult supporting Charter School functions, should they fail to comply with the proof of vaccination and testing directives as stated in this Policy.
 - All employees who have not yet vaccinated should do so outside of working hours. Employees who demonstrate they are unable to get vaccinated outside working hours may use either COVID-19 Supplemental Paid Sick Leave or accrued sick leave for time spent attending a COVID-19 vaccination appointment. In such cases, employees must consult with their supervisors regarding the best time to be excused to receive the vaccine and are responsible for arranging coverage during their absence to get vaccinated, if applicable.
 - Employees who experience symptoms related to a COVID-19 vaccine that prevent the employee from being able to work or telework may be entitled to COVID-19 Supplemental Paid Sick Leave, if available and upon request.
 - The Charter School will not discriminate, harass, or retaliate against any employee for receiving the COVID-19 vaccine or for electing not to receive the COVID-19 vaccine. However, the School reserves the right to appropriately discipline an employee for non-compliance with this policy, consistent with applicable law.
 - As public health and legal guidance regarding COVID-19 vaccinations evolves, the Charter School reserves the right to revise this Employee Vaccination Policy. Upon any revision to this Employee Vaccination Policy, the Charter School will provide immediate notice in writing to all employees.
 - Employee with any questions regarding the Charter School's Employee Vaccination Policy may contact Human Resources Department at hr@magnoliapublicschools.org.

15. COVID-19 Vaccination Policy for Students. The Charter School has adopted the following COVID-19 student vaccination policy (“Student Vaccination Policy”). The purpose of this Student Vaccination Policy is to protect the health, safety, and well-being of all Charter School employees, students, families, and stakeholders to the maximum extent possible, and to facilitate a safe and meaningful return to in-person instruction. The Charter School drafted this policy in compliance with all applicable federal and state laws, including guidance from the Equal Employment Opportunity Commission (“EEOC”), Centers for Disease Control and Prevention (“CDC”), the California Department of Public Health (“CDPH”), and local health authorities.

- Pursuant to the directive of the Los Angeles Unified School District, all students of MSA-2, 3, 4, 6, 7, and 8 who are eligible to receive COVID-19 vaccination must be vaccinated against COVID-19 by the first day of the 2022-2023 school year, unless medically exempted, or they will not be permitted on campus. At this time, the Student Vaccination Policy applies only to students at MSA-2, 3, 4, 6, 7, and 8.
- **Proof of Vaccination.**
 - Vaccination status can only be proven by one of the following methods acknowledged by the California Department of Public Health:
 - COVID-19 Vaccination Record Card (issued by the Department of Health and Human Services Centers for Disease Control and Prevention or WHO Yellow Card) which includes the name of the person vaccinated, type of vaccine provided and date last dose administered; OR
 - A photo of a Vaccination Record Card as a separate document; OR
 - A photo of the client’s Vaccination Record Card stored on a phone or electronic device; OR
 - Documentation of COVID-19 vaccination from a health care provider; OR
 - Digital record that includes a QR code that when scanned by a SMART Health Card reader display to the reader client name, date of birth, vaccine dates and vaccine type.
- **Parental Consent.**
 - Parent/guardian consent is required for vaccination of students 12-17 years of age.
 - A student consent form is available at the Daily Pass Portal at <https://DailyPass.lausd.net> and is included to be filled out as part of the process of making an appointment to receive COVID-19 vaccination from the Los Angeles Unified School District.
 - Parents/guardians may be present at, but will not be required to attend, their child’s appointment to receive a COVID-19 vaccination from the Los Angeles Unified School District.

- **Compliance Requirements.**

- To provide proof of vaccination, parents/guardians must upload adequate documentary proof of vaccination to the Daily Pass system and ensure that the information appears in the “Vaccinations” tab of their student’s Daily Pass. Students vaccinated by the Los Angeles Unified School District do not need to submit their vaccination record, as it will be automatically updated following receipt of the vaccine.
- At this time, the Pfizer-BioNTech COVID-19 vaccine is the only vaccine approved for individuals aged 12 to 17. Students who are 18 or older may also use the Johnson & Johnson or Moderna vaccine to satisfy the vaccination requirement.
- To meet the deadlines imposed by the Los Angeles Unified School District for student vaccination, students aged 12+ should receive their first dose of the Pfizer-BioNTech vaccine no later than 5 weeks prior, and second shot no later than two weeks prior, to the vaccination requirement deadline. To meet the vaccination deadline, students aged 18+ should receive the single dose of the Johnson & Johnson vaccine no later than two weeks prior to the vaccination deadline. And, to meet the deadline using the Moderna vaccine, students should receive their first shot no later than 6 weeks prior to their deadline with their second shot coming no later than two weeks prior to the vaccination requirement deadline.
- Students of MSA 2, 3, 4, 6 and 8 who are 12 and older will not be permitted to participate in extracurricular activities starting October 31, 2021, unless they provide proof of COVID-19 vaccination through the Daily Pass system.

- **Exemptions and Conditional Admissions.**

- Parents/guardians may apply for exemptions from the COVID-19 vaccine requirements only for medical reasons. The medical exemption process must be followed with the completion of the *Student Medical Exemption to the COVID-19 Vaccine* form and its submission via the Daily Pass portal.
 - Students who are not in compliance by the deadline may be conditionally admitted if they are in one of the following groups: 1) foster youth, 2) experiencing homelessness, 3) migrant, 4) military family, or 5) has an IEP.
 - There are no religious or personal belief exemptions to the Student Vaccination Policy. Because this Student Vaccination Policy is implemented at the directive of the Los Angeles Unified School District, the Charter School cannot grant exemptions outside of those granted through the District’s Daily Pass process.
- MSA 2, 3, 4, 6, 7, and 8 students who fail to comply with the Student Vaccination Policy by the first day of Fall Semester 2022, will be excluded from physically entering campus.

- MSA 2, 3, 4, 6, and 8 students will still be required to comply with all COVID-19 testing frequencies mandated by the Los Angeles Unified School District without regard to vaccination status.

16. Communications to the Charter School Community: The Charter School will keep families, staff, and the community informed, engaged, and in touch as the new school year begins, by implementing the following communications measures:

- The Charter School will engage with families and staff to develop strategies to prepare and respond to the COVID-19 emergency, including guidelines for families about when to keep students home from school and other topics.
- Communications will include a process for engaging families for potentially unknown concerns that may need to be accommodated.
- Prior to the start of the school year, the Charter School will communicate to staff, students, and parents about new, COVID-19-related protocols, including:
 - Proper use, removal and washing of face coverings.
 - Screening practice.
 - How COVID-19 is spread.
 - COVID-19 specific symptom identification.
 - Preventing the spread of COVID-19 if you are sick, including the importance of not coming to work if staff members have symptoms, or if they or someone they live with has been diagnosed with COVID-19, including pertinent isolation and quarantine policies.
 - Local community testing sites and options for obtaining COVID-19 testing from private medical providers, including any testing arranged by the Charter School.
 - Guidelines for employees regarding COVID-19 specific symptom identification and when to seek medical attention.
 - Guidelines for families about when to keep students home from school.
 - Systems for self-reporting symptoms.
 - Criteria and plan to close schools again for physical attendance of students.
 - Changes in Charter School extracurricular, academic, and meal programs to help prevent the spread of COVID-19.
 - Contact information at the Charter School for students who may have been exposed to COVID-19.
 - Charter School contact information if a student has COVID-19 symptoms or may have been exposed to COVID-19.
- The Charter School will provide information to parents and guardians regarding this Policy

and related guidance, along with the safety measures that will be in place in indoor and outdoor settings with which parents and guardians must comply.

- This Policy will be posted at all public entrances to the Charter School campus.
- The Charter School will develop a communications plan for implementation if the school has a positive COVID-19 case in accordance with CDPH and CDE guidelines.

The MPS CEO/Superintendent is authorized to implement changes or additions to this policy in order to ensure compliance or consistency with new or revised orders or guidance from local, county, state or federal authorities (“Agencies”), to take any and all actions consistent with orders and guidance from the Agencies that is not specifically addressed by this policy, and to ensure compliance with the Charter School’s charter petition. The MPS CEO/Superintendent shall provide the Board with regular updates as to actions taken pursuant to this section.

Appendix

Site Specific Planning Form

This document has been included to align with the Los Angeles Unified School District’s (“LAUSD”)’s COVID-19 Containment, Response and Control Plan (“Containment Plan”). Pursuant to the LAUSD’s Containment Plan, the LAUSD is requiring all Los Angeles Unified schools complete this form, along with the pre-filled versions of the Los Angeles County Department of Public Health COVID-19 Reopening Protocols for K-12 Schools: Appendices T1 and T2 documents.

School Name: _____

Date Last Revised: _____

School Address: _____

Location Code: _____

School Phone Number: _____

Campus Density

- Approximate Square Footage open: _____
- Maximum Student Capacity: _____
- Maximum Number of Staff with physical distancing: _____
- Total Number of Students Enrolled: _____
- 25% of Total Number of Students Enrolled: _____
- In-person class size is limited to: _____
- The **maximum** number of students & staff permitted on campus at any one time to ensure no more than 25% of total student body and to maximize physical distancing is:

Specialized Services for defined subgroups of children (T1)			
Enter the estimated total number of students that will return per grade (if none, enter 0)			
TK:	3:	5:	9:
K:	4:	6:	10:
1:	5:	7:	11:
2:	6:	8:	12:

Estimated total number of administrators, teachers, and other employees on campus supporting resumption of all permitted in-person services for students: _____

Services

The [Grab & Go Food Center](#) located closest to this school is at:

- School Name: _____
- Address _____

The [COVID-19 Test Center](#) located closest to this school is at:

- School Name: _____
- Address: _____

School COVID-19 Compliance Task Force

Name	Job Title	Role
	(Principal)	Leader
		COVID-19 Compliance Officer
	(School Administrative Assistant)	Attendance Monitor
	(Plant Manager)	Cleaning/Disinfecting Operations
	(School Nurse)	Exposure Management Advisor
		Health Office Manager
		Data Collection Manager

Health Office Set-up and Staff

Type of Health Office	Indoor vs. Outdoor	Location	Staff Person(s)	Alternate	Runner
General Health Office (Non-COVID)					
Isolation Area (Recommended Outdoors)					
Quarantine Area					

School Communications

The following information was sent to parents/students prior to the start of in-person services: (check all that apply)	
<input type="checkbox"/> Isolation and quarantine policies as they apply to students who have symptoms or may have been exposed	<input type="checkbox"/> Options for COVID-19 testing if the student or a family member has symptoms or exposure to COVID-19
<input type="checkbox"/> Changes in school meals to avert risk	<input type="checkbox"/> Required use of face coverings
<input type="checkbox"/> How to conduct a symptom check before students leave home for school	<input type="checkbox"/> Changes in academic and extracurricular programs to avert risk
<input type="checkbox"/> Importance of student compliance with physical distancing and infection control policies	<input type="checkbox"/> Who to contact at the school if students have symptoms or may have been exposed
<input type="checkbox"/> School policies concerning parent visits to school and advisability of contact the school remotely	<input type="checkbox"/> Importance of providing up-to-date emergency contact information, including multiple parent contact options

Cover Sheet

Approval of Assurance of Compliance for 2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services for Magnolia Science Academy-5

Section: IV. Action Items
Item: C. Approval of Assurance of Compliance for 2022 Significant
Disproportionality Comprehensive Coordinated Early Intervening Services for Magnolia
Science Academy-5
Purpose: Vote
Submitted by:
Related Material: CCEIS Assurance.pdf



Board Agenda Item #	IV C: Action Item
Date:	April 7, 2022
To:	Magnolia Public Schools - Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Dr. Artis Callaham, Director of Special Education Erdinc Acar, Chief Academic Officer
RE:	Approval of Magnolia Science Academy 5's Assurance of Compliance for 2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services for MSA-5

Proposed Board Recommendation

Staff recommends the MPS Board approve the Assurance of Compliance for the 2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services for MSA-5 and for the MPS Board Chair to sign.

Background

Under the Federal Individuals with Disabilities Education Act (IDEA) requirements, if an LEA is identified as significantly disproportionate, the LEA must reserve 15 percent of its 611 and 619 IDEA grant funds to provide CCEIS to students in the LEA. These services are for children from age 3 through grade 12, particularly, but not exclusively, children in those groups that were significantly overidentified who need additional academic and behavioral supports.

CCEIS activities will:

- Address the factors contributing to the significant disproportionality.
- Focus on academic and behavioral instructional services and professional development.
- Consider age three through twelfth grade instructional activities with a primary focus on students age three through third grade.
- Occur within the allowable CCEIS budget period of 27 months.

IDEA also requires that LEAs provide for the review and, if applicable, revision of the policies, procedures, and practices it identifies as contributing to the significant disproportionality, including a policy, practice or procedure that results from a failure to identify, or the inappropriate identification of, a racial or ethnic group (or groups); and publicly report any revision of policies, practices, and procedures.

On March 15, per CDE's Special Education Division (SED), the monitoring level of MSA-5 has been identified as Significant Disproportionality. Within 30 days upon receipt of notification of Significant Disproportionality, the attached Assurance of Compliance must be signed and emailed to SigDisp@cde.ca.gov. The school and home office team will attend a series of technical assistance webinars and work with a technical assistance facilitator to develop a CCEIS plan. The plan requires board notification and approval.

More on CDE's Compliance and Improvement Monitoring (CIM) Process

This year, the CDE is introducing the Compliance and Improvement Monitoring (CIM) Process to replace previous monitoring activities such as the Special Education Plan. LEAs in Targeted Level 2, and Intensive Levels 1 through 3 will participate in the CIM. LEAs in Targeted Level 3 will conduct a review of policies, procedures and practices. LEAs in Significant Disproportionality will be required to complete a Comprehensive Coordinated Early Intervening Services Plan (CCEIS).

The CIM Process is designed to help LEAs identify systemic issues in the LEA that lead to poor student outcomes, create a plan that prioritizes high leverage activities, and implement the plan with fidelity. The CIM Process is a four-step process that walks the LEA through the necessary activities that lead to a cohesive and comprehensive plan. The CDE will provide templates and guidance for activities aligned to each step, listed below.

- **Step 1: Gather and Inquire.** The LEA gathers, reviews and synthesizes data and information to determine the current issues and problems that exist in the LEA.
- **Step 2: Investigate.** The LEA examines the problems identified in order to determine the causes of those problems, prioritizes the concerns and develops a theory of action to address the root cause.
- **Step 3: Plan.** The LEA identifies the highest leverage activity and develops a detailed plan for implementation including a timeline and milestones. This can be an independent plan or part of other improvement plans, including the Local Control and Accountability Plan (LCAP), developed by the LEA.
- **Step 4: Implement.** LEAs, technical assistance providers, and CDE monitor the implementation of the plan over time to determine if the LEA is meeting the timelines or milestones and to ensure appropriate supports are provided. If the LEA is not meeting timelines or milestones, the CDE will engage with the LEA to assist in efforts to implement the plan. The CDE will also determine if, at any time, the LEA needs to revisit and update the plan.

The CDE will provide a detailed introduction to LEAs in each Level three part webinar series.

Budget Implication

MSA-5 will reserve 15 percent of its upcoming years' 611 and 619 IDEA grant funds to provide CCEIS to students in the LEA until designated otherwise.

Attachments

Assurance of Compliance: 2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services

ASSURANCE OF COMPLIANCE

2022 Significant Disproportionality Comprehensive Coordinated Early Intervening Services

Individuals with Disabilities Education Act of 2004, Part B Grant

Within 30 days upon receipt of notification of Significant Disproportionality, the Assurance of Compliance must be signed and emailed to SigDisp@cde.ca.gov.

As a special condition for receipt of the federal fiscal year (FFY) 2021 Individuals with Disabilities Education Act (IDEA) Part B grant funds, the local educational agency (LEA) must meet the following:

Part 1: The LEA shall comply with 34 *Code of Federal Regulations (CFR)* Section 300.646, which requires an LEA to: (1) reserve exactly 15 percent of the Part B IDEA sections 611 and 619 funds received for Comprehensive Coordinated Early Intervening Services (CCEIS). The LEA cannot reduce its state and/or local expenditures for the maintenance of effort by the allowable 50 percent adjustment of the new IDEA funds received in FFY 2022–23; (2) provide for the review and, if applicable, revise the policies, procedures, and practices used for the identification or placement of students into special education that comply with IDEA requirements; and (3) publicly report any revision of policies, procedures, and practices in Part 1(b).

Part 2: Any LEA that uses 15 percent of IDEA Part B funds for CCEIS must report annually to the California Department of Education (CDE), the state education agency, on (1) the number of students who receive CCEIS; and (2) the number of students who received early intervening services, and who subsequently receive special education and related services within two years after receiving CCEIS.

Part 3: The LEA shall comply with the provisions of IDEA (20 *United States Code* Section 1413[f]) and the regulations in 34 *CFR* Section 300.226 which define and describe CCEIS. Specifically, CCEIS funds may be used to supplement, but not supplant, services aligned with, and activities funded by, and implemented with a federally funded project; most notably, the Elementary and Secondary Education Act which includes Title I services. There is not a requirement to “supplement not supplant” for state or local funds (34 *CFR* Section 208 [a]). CCEIS funds may be used to develop and support a multi-tiered system of prevention and intervention options, but may not be used to support the implementation of core or universal activities designed to provide high quality instruction to all students in a grade, school, or LEA.

Part 4: The LEA shall report to the Special Education Division the FFY 2022–23 Part B IDEA section 611 grant amounts for Resource 3310 allocation and Subgrant 619 grant amounts for Resource 3315 allocation. Similarly, the LEA agrees to provide the FFY 2022–23 Part B IDEA Subgrant 611 grant amounts for Resource 3310 and Subgrant 619 grant amount for Resource 3315 allocation.

Part 5: For FFY 2022–23, the LEA shall provide a budget allocation and allowable costs budget to the California Department of Education (CDE) for the 15 percent of Part B

IDEA funds used for CCEIS. LEAs are permitted to use IDEA Part B funds to develop and provide CCEIS within the allowable budget period, July 1, 2022, through September 30, 2024. The allowable cost budget shall detail how and for whom these funds will be spent to implement and/or improve the LEAs CCEIS Programmatic Improvement Process. All of the allowable budget items MUST be part of CCEIS for students ages three to grade twelve. The LEA is required to obtain ten hours of technical assistance (TA) for each indicator identified. The TA facilitator(s) must be a CDE approved TA facilitator.

Part 6: The LEA shall implement CCEIS as described in the Essential Questions and Answers document by the Office of Special Education Programs, Office of Special Education and Rehabilitations Services, U.S. Department of Education (ED) on the ED Web page at <https://sites.ed.gov/idea/files/significant-disproportionality-qa-03-08-17.pdf>. (Enclosure 7)

Part 7: The LEA shall comply with the guidance and monitoring provided by the CDE including making records, data, and reports available through a knowledgeable and accountable contact person. The SELPA director must certify their involvement in the development of the Significant Disproportionality CCEIS Programmatic Improvement Process, any addendums, fiscal information, and quarterly reports.

Complete the required information for the identified LEA:

LEA Name:	County District Code:
LEA Contact Name:	LEA Contact Email:
SELPA Name:	SELPA Contact Email:

The following signatures convey agreement with the above seven parts:

LEA Superintendent (Print Name & Signature)	Date Signed:
	Contact Phone:
LEA Special Education Director (Print Name & Signature)	Date Signed:
	Contact Phone:
School Board Chairperson (Print Name & Signature)	Date Signed:
	Contact Phone:
SELPA Director (Print Name & Signature)	Date Signed:
	Contact Phone:

Cover Sheet

Approval of Magnolia Public Schools Student Recognition and Incentive Policy

Section:	IV. Action Items
Item: and Incentive Policy	D. Approval of Magnolia Public Schools Student Recognition
Purpose:	Vote
Submitted by:	
Related Material:	Approval of MPS Student Recognition and Incentive Policy.pdf



Board Agenda Item #	IV D: Action Item
Date:	April 7, 2022
To:	Magnolia Public Schools – Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Jason Hernandez, Director of Student Services
RE:	Approval of MPS Student Recognition and Incentive Policy

Proposed Board Recommendation

Staff recommends that the MPS Board approves the Student Recognition and Incentive Policy for all schools.

Background

Magnolia Public Schools (“MPS”) seeks to increase the effectiveness and positive outcomes of its students’ academic, behavioral, and socio-emotional education through the schools’ Attendance Recognition, Academic Recognition, Athletic Recognition, and Positive Behavioral Interventions and Supports (“PBIS”) programs.

Purpose:

The purpose of the policy is to benefit and improve the effectiveness of academic, behavioral, and socio-emotional education of MPS students in schools for the public interest. The key features of the MPS school-wide recognition program are as follows:

- The system is designed for ALL students. Emphasis is placed on making improvements and reaching milestones on data indicators.
- Public recognition provides a model for other students. The recognition for positive actions encourages their peers to display similar behaviors.
- Recognitions and incentives will be meaningful to students, staff, and families in the school community.
- Community members collaborate to create and sustain recognition of student achievement in various areas.

- Recognition can always be delivered unpredictably.
- Importance of re-teaching behaviors as needed. The community will work to identify areas of need and use reteaching moments to increase positive reinforcement and monitoring.

Scope: Recognition and incentive programs apply to the areas and school functions namely, Student Attendance, PBIS/Student discipline, Academic Achievement, Athletic Achievement, and Parent Involvement.

The MPS Board of Directors (“Board”) has determined that supporting these school and organization-wide student recognition programs serves a direct and substantial public purpose by encouraging student engagement to reach milestones, fostering a school community that supports student achievement, and by reinforcing behaviors that benefit all students and the entire school community. The Board, therefore, authorizes the expenditure of funds for these programs as described in this policy.

Budget Impact: The passage of the policy will have a varying impact on school budgets. Each school will determine allowable funding sources and budget accordingly for the expenses.

Attachment:

MPS Student Recognition and Incentive Policy

Revision: 1**Prepared by:** Central Office**Effective Date:** 4/7/2022**Approved by:** BOD**Title: MPS STUDENT RECOGNITION AND INCENTIVE POLICY**

Magnolia Public Schools (“MPS”) seeks to increase the effectiveness and positive outcomes of its students’ academic, behavioral, and socio-emotional education through the schools’ Attendance Recognition, Academic Recognition, Athletic Recognition, and Positive Behavioral Interventions and Supports (“PBIS”) programs. The MPS Board of Directors (“Board”) has determined that supporting these school and organization-wide student recognition programs serves a direct and substantial public purpose by encouraging student engagement to reach milestones, fostering a school community that supports student achievement, and by reinforcing behaviors that benefit all students and the entire school community. The Board, therefore, authorizes the expenditure of funds for these programs as described in this policy.

Approved Recognition Programs

- **Attendance Recognition.** MPS recognizes the important role that daily attendance serves in education. A student must be present at school to learn. Regular school attendance is often regarded as one of the most important elements of a student’s education. The Board authorizes each MPS school to recognize students who maintain an attendance rate of 100%, or 98% or higher, and students who have significantly increased their attendance rate from the prior school year(s). This would be a one-time recognition per year, preferably near the end of the school year.
- **Academic Recognition.** MPS wishes to acknowledge (in a public manner) students who succeed academically in order to motivate those students to continue working hard and to inspire and encourage other students. The Board authorizes each MPS school to recognize the top 15% of scholars in each grade level, and students who have made significant academic improvement during the school year at the principal’s determination. This would be a one-time recognition per year, preferably near the end of the school year.
- **Athletic Recognition.** MPS observes how athletics encourage students to push themselves physically, to work together and support other students as a team, to respond to wins and losses with grace, and to gain self-esteem. Student-Athletes have the opportunity to represent their school with pride and responsibility to maintain academic eligibility, high standards of citizenship at all times, sportsmanship, and play the game to the best of their ability. The Board authorizes each MPS school to recognize students who earn “most valuable player” or “MVP” status on their teams or in a particular sport, event, or match.

- **PBIS Program.** MPS appreciates the benefit that setting behavior expectations and strategies have on encouraging good behavior and increasing school safety, which benefits the particular student as well as the schools' overall educational programs and campus environment. The Board authorizes each MPS school to recognize students who have made significant improvements through the PBIS program or another similar merit-based system, as determined by the principal.

Approved Recognition Awards and Incentives

The Board delegates authority to each school principal, after consulting with school teachers, coaches and staff, as the case may be for each recognition category, to select students to recognize through one or more of the approved recognition programs above. The cost for each award shall be nominal and reasonable, generally not to exceed \$50.00 per item, or if a meal, per student.

The items that may be awarded to MPS students for recognition as described herein shall be limited to the following:

- Positive phone call home
- Lunch Speed Pass
- Free Dress Pass
- Entered in a raffle
- Certificates or trophies
- School sweatshirt or other school name/logo promotional items
- Letter jacket or school name/logo apparel (for athletic recognition)
- Public recognition at an assembly or in the school newspaper, newsletter, or other publication
- Honor dinner or appreciation meal

The Board has determined that the above student recognitions, awarded in accordance with this policy, serve a direct and substantial public purpose. The school principal shall retain documentation for all award purchases, including the name of the recipient, the date and cost of the award or recognition, and the basis for recognition or incentive.

Originally Adopted: April 7, 2022

Revision History:

Cover Sheet

Approval to Extend Due Diligence Period for Purchase of 18242 Sherman Way

Section: IV. Action Items
Item: E. Approval to Extend Due Diligence Period for Purchase of
18242 Sherman Way
Purpose: Vote
Submitted by:
Related Material:
Approval of Exercise of Option to Extend Due Diligence Contingency Period for Purchase
of 18242 Sherman Way.pdf



Board Agenda Item: IV E: Action Item

Date: April 7, 2022

To: Magnolia Public Schools ("**MPS**") Board of Directors ("**MPS Board**")

From: Alfredo Rubalcava, Chief Executive Officer and Superintendent
Patrick Ontiveros, General Counsel & Director of Facilities
Mustafa Sahin, Project Manager

RE: Approval of Exercise of Option to Extend Due Diligence Contingency Period for Purchase of 18242 Sherman Way

I. Proposed Motion/Recommendation(s)

Staff recommends and moves that the Board approve (1) the exercise by MPS of its option under that certain purchase and sale agreement signed by MPS dated as of January 13, 2022 for the purchase of the property located at 18242 Sherman Way (the "**Property**") to extend its contingency/due diligence period for one (1) thirty (30) day period from April 28, 2022 to May 30, 2022, and in conjunction therewith, (2) the release by MPS of Ten Thousand Dollars (\$10,000.00) from the escrow established for the aforementioned transaction as consideration for the exercise of the extension option, and (3) the execution by the MPS CEO and Superintendent, or his designees, of such documents and instruments as may be necessary to undertake and complete the foregoing actions.

II. Background

At its November 18, 2021 meeting, the MPS Board approved MPS signing a purchase and sale agreement for the purchase of the Property and making a good faith, refundable, escrow deposit of Fifty Thousand Dollars (\$50,000). Portions of the "Background" section of the November 18th report is excerpted below.

*MPS, for the benefit of Magnolia Science Academy –1 ("**MSA-1**"), leases the property located at 18220 and 18238 Sherman Way from MPM Sherman Way LLC, a California limited liability company and wholly owned subsidiary of Magnolia Properties Management, Inc., a California non-profit public benefit corporation and 501(c)(3) tax exempt organization. MSA-1 operates a middle school and high school on the leased premises. ...*

The Property at 18242-1844 Sherman Way is immediately adjacent to the MSA-1 premises on the westerly side of the premises. ... It consists of a 7,729 square foot building, which fronts Sherman Way, and a surface parking lot of approximately 17,140 square feet. The Property is presently leased to another tenant and must delivered free of all tenancies by the close of escrow.



MPS's real estate broker, InSite EFS, Inc., negotiated an offer for the purchase of the Property. The Owner has tentatively agreed to sell the Property to MPS or its assignee subject to the signing of a formal purchase and sale agreement, which is the subject of this report and the recommendation stated herein. The terms agreed upon by the parties include the following:

Price	\$4,000,000
Free Look/Due Diligence Period	90 Days with option to extend by 30 days for \$10,000
Good Faith Deposit	\$50,000
Closing Period	30 days. Owner has the option to extend for an additional 120 days in order to vacate tenant.

During the due diligence period, MPS or its assignee, will review the condition of the existing building and surface parking lot and determine whether there are any hurdles to the development of the property for MSA-1's use within its budget. In addition, MPS will seek the approval of its authorizer, the Los Angeles County Office of Education, for the proposed transaction. Before the end of the due diligence period, MPS has the option to cancel the transaction and will receive a full refund of its good faith deposit.

...

The location of the Property is shown on **Exhibit A**. Escrow for the purchase and sale of the Property was opened on January 28, 2022. Since such time, MPS Staff has been engaged in due diligence activities including commissioning multiple studies: a phase I environmental site assessment, an ALTA and topographic survey, an appraisal, and a zoning/entitlements survey. A soils study and asbestos and lead based paint study are in process.

MPS hired an architect, Berliner Architects, to produce a master plan for the surface parking lot area combining MPS's parking lots and the parking lot to be acquired with the purchase of the Property. MPS intends to build a CIF gym, create open space, and create sufficient parking spaces. A schematic of one scheme is shown on **Exhibit B**.

MPS Staff is working with its financial advisor, John Buck, to arrange financing for the purchase and development of the Property. Finally, MPS Staff has advised MSA-1's charter authorizer, the Los Angeles County Office of Education ("**LACOE**"), of its desire to purchase and develop the Property and is seeking its authorization to do so.

MPS is awaiting a term sheet from a potential lender. Following receipt of the term sheet, MPS will require LACOE to authorize the transaction. Accordingly, MPS requires additional time to confirm its financing and acquire LACOE's approval. By exercising its option to extend the due diligence period, MPS will be putting an \$10,000 at risk and not its entire \$50,000 good faith deposit. In other words, if MPS releases the \$10,000 and decides that it will proceed with the acquisition then the \$10,000 will be applied to the purchase price. In the event that within the extension period MPS determines that it will not proceed with the Project it will be refunded Forty Thousand Dollars (\$40,000), that is \$50,000 less \$10,000.



III. Conclusion / Budget Impact

MPS would like to acquire or lease the Property for the benefit of MSA-1 to create additional space for MSA-1 among other things to create more recreational space. MPS is currently working with its financial advisor to secure financing for the Project. The budget impact to MSA-1 is unknown and depends on a multitude of factors including how much equity (i.e., cash) MSA—1 can invest in the Project and financing terms. Staff will keep the Facilities Committee and the Board apprised of the status of the Project, including the status of financing and approval from LACOE. It will seek Committee and Board approval prior to the end of the extended due diligence period in order either to move forward with the transaction and allow its good faith deposit to become non-refundable or to terminate the project and not move forward. The budgetary impact of \$10,000 will be incorporated into the MSA 1 operating budget.

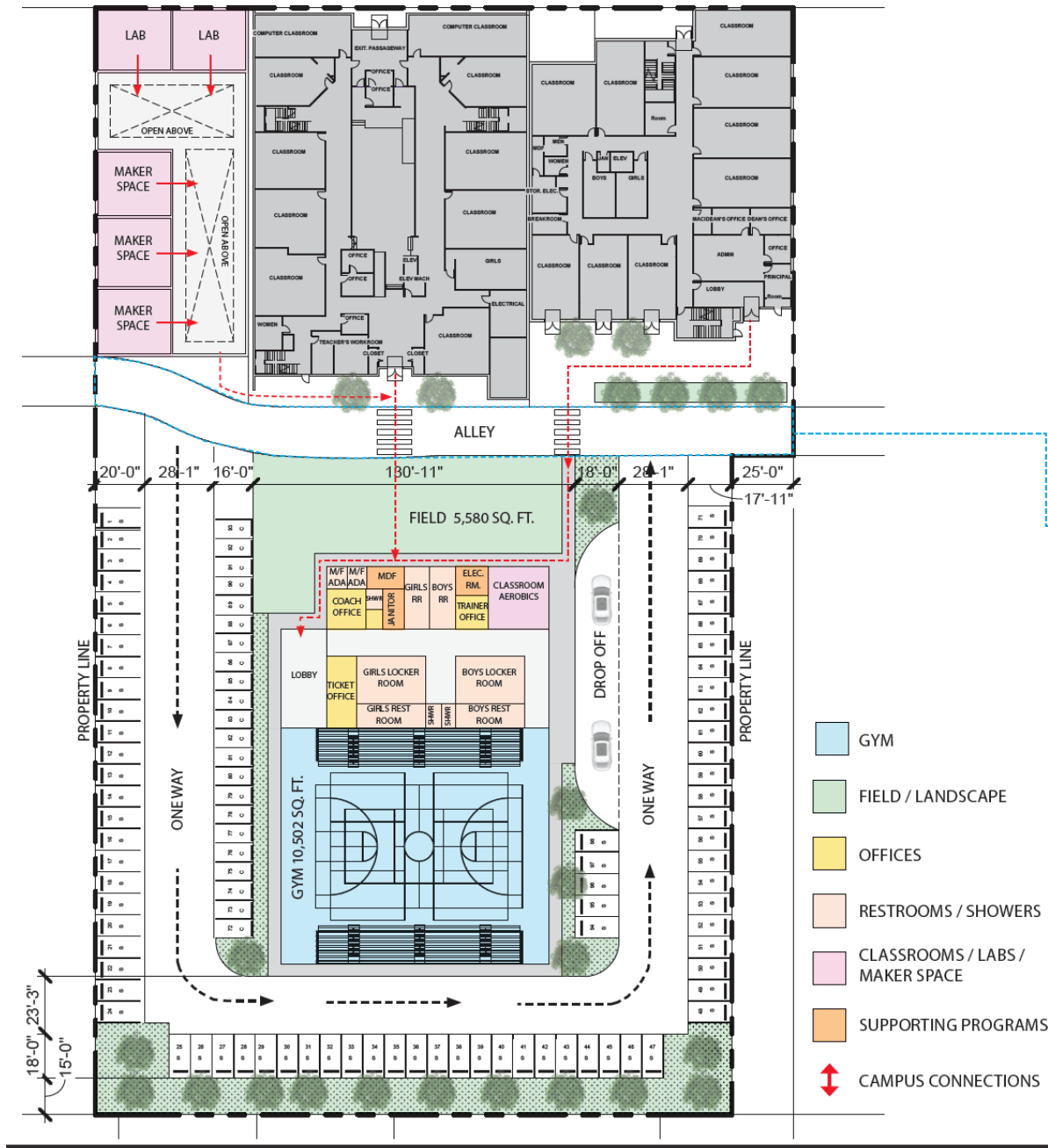


Exhibit A



EXHIBIT B

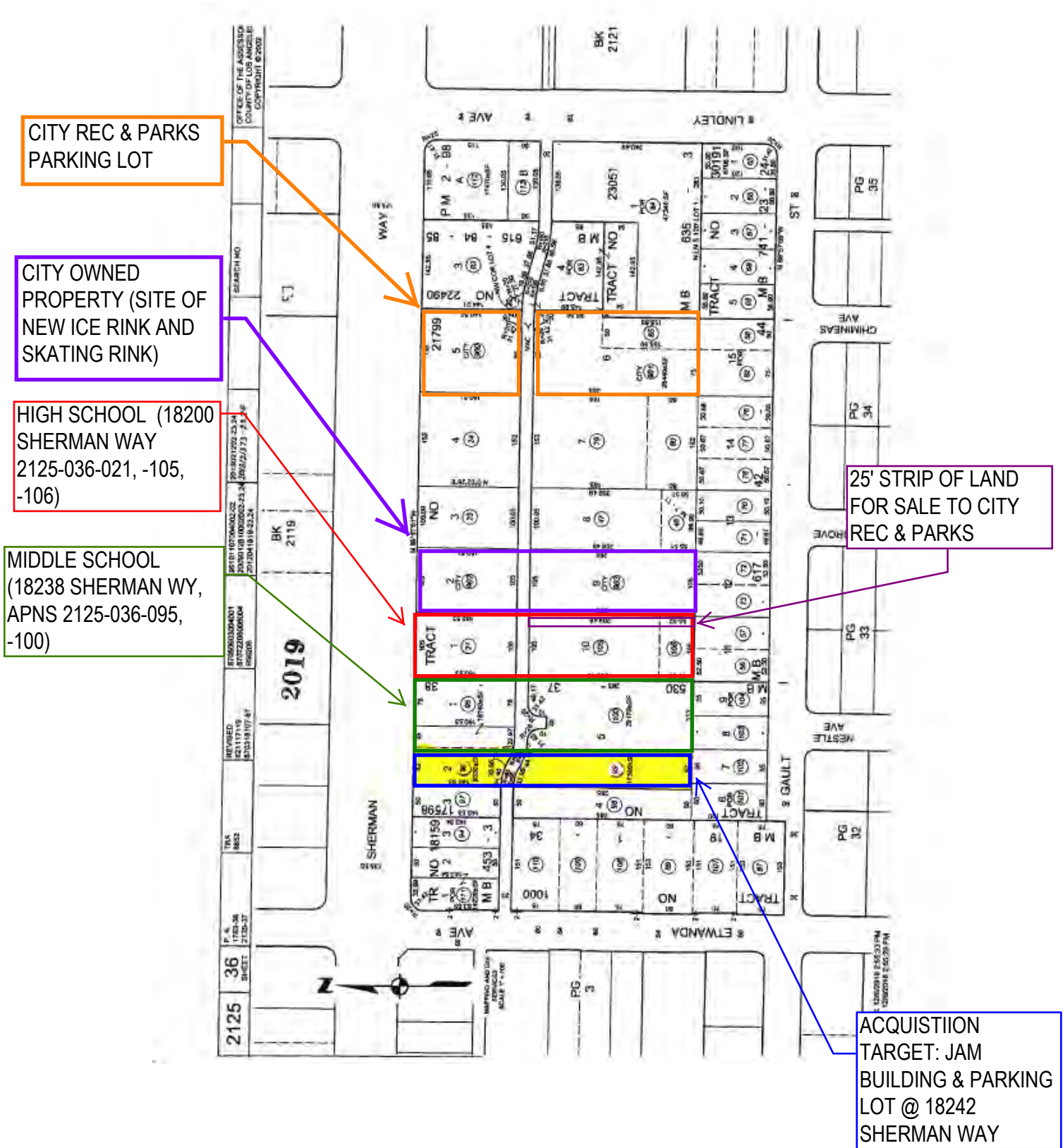
MASTER PLAN CONCEPT



A

MAGNOLIA SCIENCE ACADEMY 1 - TEST FIT

EXHIBIT A



SUBJECT PHOTOGRAPHS



Subject front



Subject rear

Cover Sheet

Approval to Extend Due Diligence Period for Purchase of 7111 Winnetka Ave

Section: IV. Action Items
Item: F. Approval to Extend Due Diligence Period for Purchase of
7111 Winnetka Ave
Purpose: Vote
Submitted by:
Related Material:
Approval of Exercise of Second Option to Extend Due Diligence Contingency Period for
Purchase of 7111 Winnetka Avenue.pdf



Board Agenda Item: IV F: Action Item

Date: April 7, 2022

To: Magnolia Public Schools (“**MPS**”) Board of Directors (“Board”)

From: Alfredo Rubalcava, Chief Executive Officer and Superintendent
Patrick Ontiveros, General Counsel & Director of Facilities
Mustafa Sahin, Project Manager

RE: Approval of Exercise of Second Option to Extend Due Diligence Contingency
Period for Purchase of 7111 Winnetka Avenue

I. Proposed Motion/Recommendation(s)

Staff recommends and moves that the Board approve (1) the exercise by MPS of its option under that certain purchase and sale agreement signed by MPS dated as of December 15, 2021 for the purchase of the property located at 7111 Winnetka Ave. (the “**Property**”) to extend its contingency/due diligence period for one (1) additional thirty (30) day period from April 21, 2022 to May 21, 2022, and in conjunction therewith, (2) the release by MPS of Twenty Thousand Dollars (\$20,000.00) from the escrow established for the aforementioned transaction as consideration for the exercise of the extension option, and (3) the execution by the MPS CEO and Superintendent, or his designees, of such documents and instruments as may be necessary to undertake and complete the foregoing actions.

II. Background

At its December 19, 2021 meeting, the MPS Board approved MPS signing a purchase and sale agreement for the purchase of the Property and making a good faith, refundable, escrow deposit of Two Hundred Thousand Dollars (\$200,000). Portions of the “Background” section of the December 19th report is excerpted below.

*For the 2021-22 school year, Magnolia Science Academy—5 (“**MSA—5**”) is co-located with Magnolia Science Academy—1 (“**MSA-1**”) at the property located at 18220 and 18238 Sherman Way in Reseda. MPS elected to co-locate MSA—5 with MSA—1 when the Los Angeles Unified School District (“**LAUSD**”) made MSA—5 an offer of space at Chatsworth High School in lieu of Reseda High School, where it has been located for several years. MSA—5 subleases space from MSA—1. MSA—1 leases such property from MPM Sherman Way LLC, a California limited liability company and wholly owned subsidiary of Magnolia Properties Management, Inc., a California non-profit public benefit corporation and 501(c)(3) tax exempt organization. MSA-1 operates a middle school and high school on the leased premises.... MPS desires to re-locate MSA—5 to its own private campus at the Property which is within close proximity to MSA—5’s original location at Reseda High School....*



The Property at 7111 Winnetka Ave ... consists of a 21,849 square foot building on land that is approximately 75,794 square feet. The Property is presently leased to multiple tenants and must be delivered free of all tenancies by the close of escrow.

MPS's real estate broker, InSite EFS, Inc., negotiated an offer for the purchase of the Property. The Owner has tentatively agreed to sell the Property to MPS or its assignee subject to the signing of a formal purchase and sale agreement, which is the subject of this report and the recommendation stated herein. The terms agreed upon by the parties include the following:

<i>Price</i>	<i>\$9,450,000,000</i>
<i>Free Look/Due Diligence Period</i>	<i>90 Days with option to extend for three 30 day periods for the following consideration: First 30 day Extension = \$15,000 Second 30 day Extension = \$20,000 Third 30 day Extension = \$25,000</i>
<i>Good Faith Deposit</i>	<i>\$200,000, increased to \$350,000 by the end of the Due Diligence Period as such may be extended by Buyer.</i>
<i>Closing Period</i>	<i>30 days. Owner has the option to extend the closing for up to six (6) consecutive 30 day periods for the purpose of removing any tenants.</i>

During the due diligence period, MPS or its assignee, will review the condition of the existing building and land to determine whether there are any hurdles to the development of the property for MSA-5's use and whether it is affordable. In addition, MPS will seek the approval of its authorizer, the Los Angeles County Office of Education, for the proposed transaction. Before the end of the due diligence period, MPS has the option to cancel the transaction and will receive a full refund of its good faith deposit.

Escrow for the purchase and sale of the Property was opened on December 22, 2021. Since such time, MPS Staff has been engaged in due diligence activities including commissioning multiple studies: a phase I environmental site assessment, an ALTA and topographic survey, an appraisal, and a zoning/entitlements survey. A soils study and asbestos and lead based paint study are in process. At its March 8, 2022 meeting the Board approved the exercise by MPS of its first option to extend its due diligence period.

MPS Staff has worked with Pacific Charter School Development ("**PCSD**"), an architect and a general contractor to evaluate and price out various design concepts that could be adapted for the Property. MPS Staff has determined that it only will proceed with the project if it will be a new construction project. MPS Staff does not believe that a tenant improvement project would yield the best facilities for MPS and its schools.

MPS Staff is working to determine the long-term affordability of the Project. In addition, MPS Staff is presently working with its financial advisor, John Buck, to arrange financing for the purchase and development of the Property as a future campus for one or two MPS schools that will need facilities. Finally,



MPS Staff has advised MSA-5's charter authorizer, the Los Angeles County Office of Education ("**LACOE**"), of its desire to purchase and develop the Property and is seeking its authorization to do so.

MPS is awaiting a term sheet from a potential lender, CLI Capital. Following receipt of the term sheet, MPS will require LACOE to authorize the transaction. Accordingly, MPS requires additional time to confirm its financing and acquire LACOE's approval. By exercising its option to extend the due diligence period, MPS will be putting an additional \$20,000 at risk (it already released \$15,000 by exercising its first option) and not its entire \$200,000 good faith deposit. In other words, if MPS spends the \$20,000 and decides that it will proceed with the acquisition then the \$20,000 will be applied to the purchase price. In the event that within the extension period MPS determines that it will not proceed with the Project it will be refunded One Hundred Sixty Five Thousand Dollars (\$165,000), that is \$200,000 less \$15,000 (first option exercise) and less \$20,000 (this second option exercise).

III. Conclusion / Budget Impact

MPS would like to acquire or lease the Property for the benefit of MSA-5 to allow MSA-5 to relocate from the MSA-1 campus to its own private facility. MPS is currently working with its financial advisor to secure financing for the Project. MPS is also working with PCSD to see if they are able to either acquire, develop and lease the Property or provide subordinate debt that will allow a subsidiary of Magnolia Properties Management Inc. to acquire the Property. The budget impact to MSA-5 is unknown and depends on a multitude of factors including how much equity (i.e., cash) MSA—5 can invest in the Project, financing terms, and participation by PCSD. Staff will keep the Facilities Committee and the Board apprised of the status of the Project, including the status of financing and approval from LACOE. It will seek Committee and Board approval prior to the end of the second extended due diligence period in order either to move forward with the transaction and allow its good faith deposit to become non-refundable or to spend additional funds to exercise another option to extend the due diligence period. The budgetary impact of \$20,000 will be incorporated into the MSA 5 operating budget.

Cover Sheet

Approval of Magnolia Public Schools Fiscal Policies and Procedures Manual for 2021-2022

Section: IV. Action Items
Item: G. Approval of Magnolia Public Schools Fiscal Policies and
Procedures Manual for 2021-2022
Purpose: Vote
Submitted by:
Related Material:
MPS Fiscal Policies and Procedures Manual Update for 2021-22.pdf



Board Agenda Item #	IV G: Action Items
Date:	April 7, 2022
To:	Magnolia Public Schools – Board of Directors
From:	MPS Finance Committee
Staff Lead:	Steve Budhrajia Ed.D., Chief Financial Officer
RE:	MPS Updated Fiscal Policies and Procedures Manual for 2021/2022

Proposed Board Recommendation

Presented to the MPS Finance Committee on April 6, 2022

I move for the Board to approve the following revisions to the MPS Fiscal Policy and Procedures Manual; G&A103, G&A113, G&A115, G&A118, G&A121, CSH101, CSH104, CSH107, CSH111, INV101, PUR101, PUR102, PUR104 and PUR106 for the 2021/2022 year.

Background

The board of directors reviewed and approved the updates Fiscal Policies and Procedures Manual on February 11, 2021. In order to improve the efficiency and productivity of workflows and adopt best practices in the industry, Finance Department staff review existing policies and are proposing following revisions accordingly.

G&A103 TRAVEL AND ENTERTAINMENT – Reimbursement receipts must be submitted monthly and any reimbursement submitted after “60 days” requires approval from the Chief Financial Officer (CFO).

G&A113 ELECTRONIC BACKUP OF ACCOUNTING INFORMATION – Remove “QuickBooks” from the language as we no longer use this accounting system.

G&A115 ACCRUED LIABILITIES – Update language to include “Senior Controller” as part of the approval process for this item based on current practices.

G&A118 BUDGETING – Add Senior Controller and the Senior Financial Analyst as approvers to budget reclassifications for the approved budgeted expenses and various resource codes.

G&A121 SCHOOL SITE ACCOUNTING – Addition of the updated Fundraiser Approval Process and Gift-Entry and Recording Policies.

CSH101 – CASH BOXES – Increase the amount of cash allowed in safe boxes from \$1,000 to \$2,500 to reduce frequency of trips to bank and allow staff additional time at the school sites.

CSH104 WIRE TRANSFERS – Update to include CFO or CEO to approve this item.

CSH107 – BANK ACCOUNT RECONCILIATIONS Update stale check policy to “120 days” to reflect industry practices.

CSH111 CREDIT CARDS AND DEBIT CARDS – Update this policy to align with industry standards and current bid limits

INV101 FIXED ASSET CONTROL AND LEASES - Update this policy to align with industry standards and current bid limits

PUR101 VENDOR SELECTION – Update this policy to align with current bid limits thresholds per County guidelines.

PUR102 GENERAL PURCHASING - Update this policy to align with industry standards and County Guidelines.

PUR104 ACCOUNTS PAYABLE AND CASH DISBURSEMENTS - Update this policy to align with current bid limits thresholds and County Guidelines.

PUR106 REIMBURSEMENTS – Update policy to align with Government Services Administration (GSA) per diem rates per auditor recommendations.

Budget Implications

N/A

Name of Staff Originator:

Steve Budhreja Ed.D., Chief Financial Officer

Exhibits (Attachments):

MPS Fiscal Policies and Procedures Manuel Update for 21/22



**FINANCIAL
POLICIES AND
PROCEDURES
MANUAL
FY 2021-22**

Board Approval Date: April 7, 2022

MPS Financial Policies & Procedural Manual

Accounting Policies, Procedures and Forms

List of Referenced Procedures

General & Administrative

1. G&A101 Chart of Accounts
2. G&A102 Files and Records Management
3. G&A103 Travel and Entertainment
4. G&A104 Management Reports
5. G&A105 Period-End Review & Closing
6. G&A106 Controlling Legal Costs
7. G&A107 Taxes and Insurance
8. G&A108 Property Tax Assessments
9. G&A109 Confidential Information Release
10. G&A110 Document Control
11. G&A111 Fax and E-mail Signatures Accepted
12. G&A112 Maintenance Requests
13. G&A113 Electronic Backup of Accounting Information
14. G&A114 Political Intervention
15. G&A115 Accrued Liabilities
16. G&A116 Notes Payable
17. G&A117 Financial and Tax Reporting
18. G&A118 Budgeting
19. G&A119 Insurance
20. G&A120 Supplies
21. G&A121 School Site Accounting
22. G&A122 Fraud Reporting & Whistleblower
23. G&A123 Conflict of Interest
24. G&A 124 Home Office Management Fees

Cash

25. CSH101 Cash Boxes
26. CSH102 Cash Receipts and Deposits
27. CSH103 Problem Checks
28. CSH104 Wire Transfers
29. CSH105 Check Signing Authority
30. CSH106 Check Matters
31. CSH107 Bank Account Reconciliations
32. CSH108 Inter-Account Bank Transfers
33. CSH109 Journal Entries and Reclassification Entries
34. CSH110 Petty Cash Purchases
35. CSH111 Credit Cards and Debit Cards
36. CSH112 Intercompany Receivables and Payables (Due To/Due From)
37. CSH113 Financial Reserves

Fixed Assets

38. INV101 Fixed Asset Control and Leases

39. INV102 Fixed Asset Capitalization & Depreciation

Investments

40. IVT101 Investments

Policies, Procedures and Forms

Revenue

- 41. REV101 Sales Receipt Processing
- 42. REV102 Invoicing and Accounts Receivable
- 43. REV103 Progress Billing
- 44. REV104 Account Collections
- 45. REV105 Revenue Recognition – Grants and Contributions
- 46. REV106 Gifts-In-Kind – Fundraising
- 47. REV107 Restricted Funds

Payroll

- 48. PYR 101 Payroll Desk Procedure
- 49. PYR 102 Time Keeping Procedure

Purchasing

- 50. PUR101 Vendor Selection
- 51. PUR102 General Purchasing
- 52. PUR103 Receiving and Inspection
- 53. PUR104 Accounts Payable and Cash Disbursements
- 54. PUR105 Prepaid Expenses
- 55. PUR106 Reimbursements
- 56. PUR107 Bidding Requirements

 Accounting Policies, Procedures and Forms

SOP # G&A101 Revision: 1
Effective Date: 9/5/2017

Prepared by: Central Office
Approved by: BOD

Title: G&A101 CHART OF ACCOUNTS

Policy: To facilitate the record keeping process for accounting, all ledger accounts should be assigned a descriptive account title and account number.

Purpose: To provide the method for assignment and maintenance of the company's chart of accounts in order to produce meaningful financial data for the Organization.

Scope: This procedure applies to all general ledger accounts.

Responsibilities: The Chief Financial Officer is responsible for monitoring and approving changes to the company's Chart of Accounts.

Definition: Chart of Accounts – A categorized listing of all account titles and numbers being used by an organization to track income, expenses, assets, equity, and liabilities is called a Chart of Accounts.

Procedure:

1.1 DESIGN OF ACCOUNTS

1.2 Accounts should have titles and numbers that indicate specific ledger accounts such as Cash in Checking, Furniture and Fixtures, Accounts Payable, etc.

1.3 In general, the Standardized Account Code Structure (SACS) is followed for the major code segments, including resource function, object and location.

1.4 Sub-divisions should be used to provide additional clarification, as needed. A sub-division among the balance sheet accounts should be designated short term to long term, (i.e. current assets should precede long term assets and current debt should precede long-term debt).

Unassigned number sequences should be left open within each group of accounts to provide for additional accounts, which may be added later.

1.5 Accounts may be numbered using the SACS format.

1.6 See Appendix A for guidance regarding SACS format.

2.1 DESCRIPTION OF ACCOUNTS

2.2 Each account should be given a short title description that is brief but will allow the reader to quickly ascertain the purpose of the account.

- 2.3** For training and consistent transaction coding, as well as to help other non-accounting managers understand why something is recorded as it is, each account should be defined. Definitions should be concise and meaningful. The account name should clearly identify what the account is to be used for.

Accounting Policies, Procedures and Forms

An example of definitions follows:

ASSETS

9121 – Main Operating Account

Includes all cash held in the operating bank account. All withdrawals and deposits are recorded here. The reported balances are supported by a bank reconciliation prepared monthly.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revisions	

G&A101 Chart of Accounts

page 2 of 4

Accounting Policies, Procedures and Forms

APPENDIX A

A copy of the California School Accounting Manual (CSAM) can be found at <http://www.cde.ca.gov/fg/ac/sa/> for guidance regarding SACS format.

G&A101 Chart of Accounts

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Accounting Policies, Procedures and Forms

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Accounting Policies, Procedures and Forms

SOP # G&A102 Revision: 1
Effective Date: 4/7/2022

Prepared by: Central Office
Approved by: BOD

Title: G&A102 FILES AND RECORDS MANAGEMENT

Policy: The Organization will retain records in an orderly fashion for time periods that comply with legal and governmental requirements and as needed for general business requirements.

Purpose: To outline the methods for filing, retaining and disposing of business records.

Scope: This procedure applies to all business documentation generated by the Organization. However, this does not necessarily cover internal or certain day-to-day business correspondence.

Responsibilities:

The Finance Staff will be responsible for categorizing and maintaining a listing of records maintained and the location (i.e. by wall unit shelf row number).

The Chief Financial Officer is responsible for overseeing the execution of Organization policy for Record Retention, Storage and Destruction of obsolete Organization records.

Procedure:**1.1 FILING SYSTEM**

To ensure efficient access, filing centers will be established in each department. To reduce the amount of duplicate and unnecessary record retention, individual desk files should be avoided unless they are used in daily operations. All other departmental or Organization records should be filed in the departmental central filing areas.

1.2 Unless necessary, records should usually only be kept by the originator or sender

and not by the receiver to avoid duplicate filing systems.

1.3 The following filing guidelines should be adhered to optimize filing efficiency and records access:

- All file cabinets and files should follow recognized rules of order, such as Left to Right, Top to Bottom, Front to Back and in the case of chronological records, newest to oldest.
- File markers or label headings should always be placed at the beginning or front of a file or group of files.
- Alphabetical files should always be filed under broad topical categories. Files should never be filed under individual employee names (except Human Resources records) to avoid confusion and re-filing in the event of turnover.

Accounting Policies, Procedures and Forms

Files should always be filed under the "proper" or Organization names whenever appropriate. In the case of individuals, files should be maintained according to the persons "Last name" then First name and Middle initial.

- Extra care should be used for sensitive or private information. Organization financial data or personnel records that contain performance reviews, salary information, and any health related information should be kept in a secure area with limited access to only those that have a "need to know" such as the Office Manager or the Chief Financial Officer.

2.1 RECORD RETENTION AND LONG-TERM STORAGE

- 2.2** Storage of archived records will be maintained in the locked storage area of the building. Access to this area will be limited to the Chief Financial Officer, officers of the Organization and the Office Manager.
- 2.3** Non-permanent files will be stored in cardboard file boxes. Each file box will be labeled on the front with the contents, dates covered, and destruction date if applicable. Permanent records will be filed electronically.
- 2.4** Files should be stored only in boxes with similar items, dates and retention periods. This will allow easier access and purging of records. A general rule to keep in mind is that it is better to only half-fill a file box than to file dissimilar types of files in the same box.
- 2.5** The Office Manager will be responsible for categorizing and maintaining a listing of records maintained and the location (i.e. by wall unit and shelf row number).
- 2.6** Maintain all files for as long as is necessary but only to the extent they serve a useful purpose or satisfy business or legal requirements. G&A102 Ex1 RECORDS RETENTION PERIODS, provides a guide to the typical business life of various documents. The retention periods provided are suggested with federal requirements in mind. Be sure to check with local and state authorities for specific record retention requirements.
- 2.7** Copies of critical records that are vital to the daily operations of the Organization should be kept off site in case of possible disasters. This may include information needed to file insurance claims (assets lists, insurance contacts, policy numbers), financial data for tax purposes (wages paid, income and expenses), contacts lists to inform or restart the business (vendors, customers, investors and employees), and other data that would assist in rebuilding the business (business plans, intellectual property, or proprietary information).

3.1 RECORD DESTRUCTION

- 3.2** Three to six months after each year-end, the Office Manager will proceed with destruction of all files that have exceeded their recognized holding period.

G&A102 Files and Records Management

page 2 of 10

Accounting Policies, Procedures and Forms

- 3.3** A listing of file categories to be destroyed will be circulated to all managers thirty days prior to destruction for review and comment. The actual listing of records destroyed will be maintained permanently for future reference.
- 3.4** Destruction of the files will be performed by an independent, outside service for shredding and disposal. Disposal of records into the Organization's general trash service is not allowed.

References:

A. HEALTH INSURANCE PORTABILITY ACCOUNTABILITY ACT (HIPAA)

The Standards for Privacy of Individually Identifiable Health Information (the Privacy Rule) creates national standards to protect individuals' personal health information and gives patients increased access to their medical records. As required by the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the Privacy Rule covers health plans, health care clearinghouses, and those health care providers who conduct certain financial and administrative transactions electronically. Most covered entities (certain health care providers, health plans, and health care clearinghouses) must comply with the Privacy Rule by April 14, 2003. Small health plans have until April 14, 2004 to comply with the Rule.

Note: Employment records maintained by a covered entity in its capacity as an employer are excluded from the definition of protected health information. The modifications do not change the fact that individually identifiable health information created, received, or maintained by a covered entity in its health care capacity is protected health information.

B. AGE DISCRIMINATION IN EMPLOYMENT ACT (ADEA)

ADEA applies to employers with 20 or more employees. If an EEOC charge or lawsuit is filed, keep records until final disposition of the charge or lawsuit. Otherwise, ADEA compliance suggests keeping basic employee files from one to three years as listed:

- Payrolls or other records (for temporary and permanent positions) for three years.
- Basic employee information such as employees' names, addresses, birth dates, occupations, rates of pay, and weekly compensation for three years.
- Applications and personnel records relating to promotion, demotion, transfer, selection for training, layoff, recall or discharge for one year.
- Job advertisements and postings for three years.
- Copies of employee benefit plans, seniority and merit systems must keep on file for the full period the plan or system is in effect and for at least one year after its termination

Accounting Policies, Procedures and Forms

C. AMERICANS WITH DISABILITIES ACT (ADA)

ADA applies to employers with 15 or more employees. If an EEOC charge or lawsuit is filed, keep records until final disposition of the charge or lawsuit.

Otherwise, ADA compliance suggests keeping employment applications and other personnel records including promotions, transfers, demotions, layoffs, and termination or requests for reasonable accommodation for at least 1 year from the making of the record or the personnel action.

D. CIVIL RIGHTS ACT OF 1964

Applies to employers with 15 or more employees. If an EEOC charge or lawsuit is filed, keep records until final disposition of the charge or lawsuit. Otherwise, basic non-discrimination compliance suggests keeping employment applications and other personnel records including promotions, transfers, demotions, layoffs, and termination or any EEO-1 Reports for at least one year from the making of the record or the personnel action. If an employee is involuntarily terminated, his/her personnel records must be retained for one year from the date of termination.

E. EMPLOYEE RETIREMENT INCOME SECURITY ACT (ERISA)

The ERISA reporting and disclosure obligations apply to all pension and welfare plans including summary plan descriptions, annual reports, reportable events, and plan termination, unless the Organization plan is exempt under ERISA.

ERISA suggests the Organization should maintain all reports, documents, information, and materials for a minimum of six years in order to disclose and or support all transactions to participants and beneficiaries (and report to certain governmental agencies), as requested or needed.

F. EMPLOYEE POLYGRAPH PROTECTION ACT

All polygraph test results and reasons for administering the test should be kept for three years.

G. EQUAL PAY ACT

Payroll records including time cards, wage rates, deductions from wages, and records explaining the difference in wage rates between men and women in similar positions should be kept for three years.

H. EXECUTIVE ORDER 11246

Applies to federal contractors and requires the preparation of affirmative action plans. Affirmative action plans must be updated annually and retained for two years along with all applications and other personnel records that form the basis of the Organization's employment decisions. Generally, personnel and employment records must be retained for two years.

Accounting Policies, Procedures and Forms

I. FAIR LABOR STANDARDS ACT (FLSA)

FLSA applies to employers engaged in or employees who work in interstate commerce and suggests the following records are retained for three years:

- Payroll and other records containing employee's name, birth date, gender, and occupation.
- Employee's beginning of workweek and time employee begins work.
- Regular rate of pay or other basis of payment.
- Hours worked per day and for workweek.
- Daily and weekly straight time earnings.
- Deduction from wages.
- Total wages per pay period.
- Date of payment and the pay period covered.
- For exempt professional, executive and administrative employees, and those employed in outside sales, the employer must maintain records that reflect basis on which wages are paid to permit calculations of the employee's total remuneration.
- In addition, employers must keep for at least two years all records (including wage rates, job evaluations, seniority and merit systems, and collective bargaining agreements) that explain the basis for paying different wages to employees of opposite sexes in the same establishment.

J. FAMILY AND MEDICAL LEAVE ACT (FMLA)

FMLA applies to employers with 50 or more employees within a 75 mile radius and whose employee must have worked for at least one year and accumulated at least 1,250 hours of service with the employer during the previous year. FMLA suggests the following records are retained for 3 years

- Basic employee data including name, address, occupation, rate of pay, terms of compensation, daily and weekly hours worked per pay period, deductions from wages, and total compensation.
- Dates of leave taken by eligible employees.
- For intermittent leave, the hours of leave.
- A copy of employee notices and documents describing policies and practices regarding leave.

- Records of any dispute regarding the designation of leave.

Accounting Policies, Procedures and Forms

K. IMMIGRATION REFORM & CONTROL ACT (IRCA)

IRCA applies to all employers and requires a signed Form I-9 is retained for three years after the date of hire and at least one year after termination.

L. OCCUPATIONAL SAFETY & HEALTH ACT (OSHA)

OSHA applies to employers with 10 or more employees and suggest that the log of occupational injuries and illnesses is retained for five years. All other records should be retained for at least 30 years after employee separation. Other records include:

- Occupational injuries and illnesses.
- The annual summary of injuries and illnesses.
- Medical records and records of exposure to toxic substances.

M. REHABILITATION ACT OF 1973

Applies to federal contractors. If a charge or lawsuit is filed, keep records until final disposition of the charge or lawsuit. Otherwise, basic compliance suggests keeping personnel and employment records including requests for accommodation, physical exams, job advertisements and postings, applications, resumes and records regarding hiring, assignments, promotions, demotions, transfers, layoffs, terminations, rates of pay and selection for training for two years (only 1 year if contractor has less than 150 employees or a federal contract of \$150,000 or less). Note: Affirmative action plans also may have to be maintained by the employer

N. RIGHT TO FINANCIAL PRIVACY ACT

The act establishes specific procedures and exceptions concerning the release of customer financial records to the federal government. It provides customers of financial institutions with a right to expect that their financial activities will have a reasonable amount of privacy from federal government scrutiny.

O. GUIDE TO RECORD RETENTION REQUIREMENTS

A good source of federal retention requirements is the "Guide to Record Retention Requirements" published by the Office of the Federal Register National Archives and Records Administration. It can be purchased from the U.S. Government Printing Office in Washington DC. Additional sources of information include: IRS

regulations, state and local government retention requirements or the AICPA (American Institute of Certified Public Accountants) Filing and Record Retention Procedures Guide.

P. IRS REVENUE PROCEDURE 98-25 RECORDS RETENTION

The Income Tax Regulations require that, except for farmers and wage-earners, any person subject to income tax, or any person required to file an information

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return with respect to income, must keep such books and records, including inventories, as are sufficient to establish the amount of gross income, deductions, credits, or other matters reported. The books or records required by must be kept available at all times for inspection by authorized internal revenue officers or employees, and must be retained so long as the contents thereof may become material in the administration of any internal revenue law.

Note: Section 6.01 requires taxpayers to maintain and make available documentation of the business processes that (1) create the retained records, (2) modify and maintain its records, (3) satisfy the requirements of section 5.01(2) of the procedure and verify the correctness of the taxpayer's return, and (4) evidence the authenticity and integrity of the taxpayer's records.

Section 6.02 sets forth four elements that the documentation required under section 6.01 must establish: (1) the flow of data through the system, (2) internal controls that ensure accurate processing, (3) internal controls that prevent unauthorized record changes, and (4) charts of account.

Section 6.03 sets forth six specific types of documentation for each retained file: (1) record formats, (2) field definitions, (3) file descriptions, (4) evidence that periodic checks are undertaken to ensure that data remains accessible, (5) evidence that the records reconcile to the taxpayer's books, and (6) evidence that the records reconcile to the taxpayer's return.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision	

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G&A102 Ex1 RECORDS RETENTION PERIODS

Accident reports and claims (settled cases)	7 years
Accounts payable ledgers, schedules and trial balances	7 years
Accounts receivable ledgers, schedules and trial balances	7 years
Assignments	3 years
Audit reports of accountants	Permanently
Bank reconciliations	1 year
Bank statements, cancelled checks, and deposit slips	7 years
Bills of lading	3 years
Capital stock and bond records	Permanently
Cash books	Permanently
Cash receipts and disbursements	7 years
Chart of accounts.....	Permanently
Checks (cancelled, all other)	7 years
Checks (cancelled, for important payments, i.e. taxes, property purchases, special contracts, etc. File checks with the transaction papers)	Permanently
Construction documents.....	Permanently
Contracts and leases (expired)	7 years
Contracts and leases still in effect.....	Expiration +7 years
Corporate records and minutes	Permanently
Correspondence (legal and important matters only)	Permanently
Correspondence general	3 years
Credit Applications (Consumer)	25 Months (after notification)
Credit Applications (Business).....	1 year (after notification)
Deeds, mortgages, and bills of sale	Permanently
Depreciation schedules	Permanently
Duplicate deposit slips	1 year
Electronic fund transfers documents	7 years
Employee personnel records (after termination)	7 years
Employment applications	3 years
Expense analyses and Expense distribution schedules	7 years
Expired contracts and notes receivable	7 years
Expired purchase contracts	7 years
Federal, state and local tax returns	Permanently
Financial statements (end-of-year trial balances)	Permanently
Fixed asset records and appraisals	Permanently
Forms W-4	7 years
Garnishments	3 years
General Ledgers (end-of-year trial balances)	Permanently
I-9s (after termination)	1 year
Insurance records, current accident reports, claims, policies, etc	Permanently
Interim and year-end financial statements and trial balances.....	Permanently

Inventories of products, materials, and supplies 7 years

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Invoices	7 years
Journals	Permanently
Licenses.....	Permanently
Loan documents, notes.....	Permanently
Minute books of directors and stockholders, including bylaws and charter ...	Permanently
Monthly trial balances	Permanently
Notes receivable ledgers and schedules	7 years
OSHA logs	5 years
Paid bills and vouchers	7 years
Payroll journals	7 years
Payroll records and summaries	7 years
Payroll reports (federal & state)	7 years
Perpetual inventory records	7 years
Petty cash vouchers	7 years
Physical inventory records	7 years
Physical inventory tags	7 years
Plant cost ledgers	Permanently
Polygraph test results and reasons for test	3 years
Property appraisals by outside appraisers	Permanently
Property records including costs, depreciation schedules, blueprints, plans...	Permanently
Property titles and mortgages	Permanently
Purchase journals	7 years
Purchase orders	7 years
Receiving sheets.....	1 year
Requisitions	7 years
Sales journals	7 years
Sales records	7 years
Savings bond registration records of employees	7 years
Scrap and salvage records (inventories, sales, etc)	7 years
Shipping tickets	3 years
Stock and bond certificate (cancelled)	1 year
Stockroom withdrawal forms	7 years
Subsidiary ledgers	7 years
Tax returns and worksheets, revenue agents' reports and other documents ...	Permanently
Time books/cards	7 years
Trade mark registrations	Permanently
Uncollectible accounts and write offs	7 years
Voucher for payments to vendors, employees, etc. (includes all allowances and reimbursement of employees, officers).....	7 years
Voucher register and schedules	7

years W-4 forms
4 years
Workman's comp documents 11 years

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SOP # G&A103 Revision: 2
Effective Date: 4/7/2022

Prepared by: Central Office
Approved by: BOD

Title: G&A103 TRAVEL AND ENTERTAINMENT

Policy: All reservations required for business travel and entertainment will be made through the Supervisor or designated staff. Expenses are to be within established Organization guidelines and will be reimbursed with proper documentation. Employees are expected to spend the Organization's money as carefully and judiciously as they would their own.

The Organization recognizes that employees who travel far from home to represent the Organization's business interests must forego their living accommodations and may forfeit personal time. Accordingly, the Organization will make efforts to provide comfortable and secure accommodations for lodging, meals and travel for employees. The Organization reserves the right to deny reimbursement of expenses that are considered lavish or extravagant.

Purpose: To provide guidelines for travel and entertainment expenses as they were actually spent, account for all advances promptly and accurately and to communicate the procedures for reimbursement.

Scope: This procedure applies to all departments and individuals who travel or entertain for the Organization.

Responsibilities:

Responsible Party: The individual employee and Supervisor When the Supervisor does not make travel arrangements, each employee is responsible for making arrangements needed for business travel.

- The Supervisor may make travel arrangements when requested, provided that arrangements are made at least 15 days in advance.

The Finance Department will receive and review documentation and Back-office provider process necessary employee reimbursement. (See PUR106, Reimbursements, for more detailed information.)

Procedure:

1.0 TRAVEL ARRANGEMENTS

1.1 All arrangements required for business travel are to be made individually or through the Supervisor. When possible, the Supervisor can solicit better corporate discounts and rates for hotels, airlines, car rental agencies and travel agencies. Employees benefit because they do not have to spend their own time comparing rates and making their own arrangements. If making your own arrangements, the employee must find the best possible travel pricing.

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- 1.2 For maximum savings on airfares, this form should always be completed at least 15 days in advance unless an emergency trip is required.
- 1.3 It is preferable that all employees travel during non-working hours to maximize efficiency. The Supervisor will make arrangements for the trip as required and will return a travel itinerary and any tickets or reservation forms to the employee.
- 1.4 **Cash Advances** - The Organization generally **discourages** cash advances unless special circumstances apply.

If an employee requires a cash advance, a formal request must be made as a check request. The advance request will then be forwarded to accounting for processing upon approval. Travel advance amounts are approved on an as needed basis.

When a cash advance is received, the employee will reduce their expense reimbursement by the amount of the cash advance. In the case where the cash advance exceeds the expenses for the report submitted, the remaining cash must be turned into the Finance Team with the expense report. Amounts owed the Organization cannot be carried forward to future expense reports. Any advance outstanding will be deducted from the employee's paycheck.

- 1.5 **Direct Billings** - Direct billings to the Organization from motels, restaurants, etc. are not permitted unless previously authorized.

2.1 TRAVEL EXPENSE GUIDELINES

- 2.2 Air Travel - Airline reservations are based on General Services Administration guidelines and the following criteria:

- Expediency: Getting the employee to their destination in an expedient way. (Direct flights when possible or connecting flights if necessary for faster flight schedules).
- Cost: Employees will fly coach class unless extenuating circumstances apply.
- Air Carrier: An employee's preferred airline can be utilized as long as expediency and cost factors are equal. In most cases, airfare will be directly billed to the Organization's credit card account.

On occasion, employees may have no alternative but to book their own flight. If this is the case, employees must use regularly scheduled airlines and obtain the lowest (discount) fare available. This may mean that employees will fly at times that are not always the most convenient for them.

- 2.3 Lodging - Lodging arrangements are based on General Services Administration guidelines and the value, convenience for the traveler and according to what is usual and customary Organization guidelines.

Whenever multiple employees are traveling to the same location, employees will be required to share accommodations if possible (i.e. male/male or female/female). Lodging accommodations will then be made for double rooms accordingly. If an employee is

accompanied by a non-employee such as family or a friend, and therefore requires

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separate accommodations, the employee will be responsible for payment of any excess lodging accommodations.

- 2.4 Meals - Employees on Organization business will be reimbursed for the actual cost of their meals not to exceed the guidelines of the General Services Administration for 2022 as follows.

- 2.5 Per-Diem allowances are as follows (Breakfast up to \$17, lunch up to \$18 and dinner up to \$34)

Officers may include reimbursement of pre-meals under the same guidelines noted above.

See form PUR104 Accounts Payable and Cash Disbursements and PUR106 Reimbursements for additional information regarding Meals.

- 2.6 Car Rentals – When possible, advance arrangements should be made by the Supervisor if a car is required at the destination, otherwise the employee is required to make their own car rental arrangements. Vehicle selection will be based upon the most cost-effective class that satisfies requirements for the employee(s) and any demonstration equipment.

Supplemental auto insurance coverage offered by car rental agencies must be purchased and will be reimbursed.

- 2.7 Personal Vehicles - An employee who uses their own automobile for business will be reimbursed according to IRS mileage reimbursement guidelines. The employee must provide on the expense report, documentation including dates, miles traveled and purpose of each trip.

The Organization assumes no responsibility for personal automobiles used for business. Further, any parking or speeding violation is the sole responsibility of the employee and each employee must have valid minimum automobile liability insurance as required by state law.

- 2.8 Telephone - Telephone charges from the hotel are not allowed unless it is an emergency.

- 2.9 Entertainment - Entertainment expenses are not allowed.

- 2.10 Miscellaneous Expenses - Any additional business expenses (including but not limited to Wi-Fi access), that are not categorized above should be pre-approved and listed under miscellaneous expenses, and documented with all pertinent information to substantiate the expense.

- 2.11 Non-Reimbursable Expenses - Some expenses are not considered valid business expenses by the Organization, yet may be incurred for the convenience of the traveling individual. Since these are not expenses for the business then they are not reimbursable. (The following can be used as a guide of expenses, which are not reimbursable)

Examples include:

- Airline or travel insurance
- Airline or travel lounge clubs
- Shoe shine or Dry-cleaning (except for extended travel beyond 5 days)

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- Movies or personal entertainment
- Books, magazines or newspapers
- Theft or loss of personal property
- Doctor bills, prescriptions, or other medical services
- Parking tickets, traffic tickets or Car towing if illegally parked
- Health club memberships
- Baby sitter or Pet care fees
- Barbers and Hairdressers

3.1 EXPENSE REPORT PREPARATION AND REIMBURSEMENT

- 3.2** All business reimbursement expenditures incurred by employees of the Organization are reimbursed through the current financial system. Reimbursement receipts must be submitted monthly and any receipt that is older than **60 days** will be reimbursed at the discretion of the Chief Financial Officer.

All required receipts for items charged must accompany all reimbursement documentation as well as uploaded into the existing financial system for approval and reimbursement payment process. In order to expedite reimbursement, the employee should ensure that the request is completed properly, required documentation is attached, proper authorization is obtained, and any unusual items properly explained and documented. Any questions regarding completion of the report should be directed to the employee's supervisor or the Finance Team.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider process	Oswaldo Diaz, CFO
2	9/5/17	Revision	
3	9/12/19	Revision	
4	11/14/19	Revision	Nanie Montijo, CFO
5	4/7/22	Revision	Steve Budhaja, CFO

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SOP # G&A104 Revision: 2
Office Effective Date: 4/7/2022 Approved by: BOD

Prepared by: Central

Title: G&A104 MANAGEMENT REPORTS

Policy: Back-office provider and MPS will prepare summary reports of vital operating statistics for the Organization, including revenues, current debt, operating cash, accounts receivable and projected short-term cash flows. These reports are to be prepared and are to supplement detailed monthly and quarterly financial reports and are to be used for timely "hands-on" management.

Purpose: To provide the format and content requirements for preparation of the Financial Reports.

Scope: The procedure applies to Back-office provider and the Finance personnel required for preparation of these reports.

Responsibilities:

Back-office provider and MPS Finance personnel will be responsible for assuring effective and informative reporting for the Organization.

Procedure:

1.0 PREPARATION GUIDELINES

- 1.1 Financial reports that provide management the necessary information to understand whether the Organization is progressing as planned are prepared monthly or as needed.
- 1.2 Back-office provider maintains electronic copies of all reports and analyses.

2.1 FINANCIAL REPORTS

- 2.2 The Chief Financial Officer should review accounting program financial reports on a regular basis.

3.1 CASH FLOW REPORT

- 3.2 The Cash Flow Report represents a summary of the cash flowing through the Organization in the near term and identifies any potential shortfall that might

occur in the near future before it occurs. The Cash Flow Report should be reviewed at least monthly by the Chief Financial Officer. This report supplements the detailed monthly and quarterly financial statement reports and provides a quick look at the cash performance of the Organization.

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- 3.3** The Cash Flow Report should include projected operating cash balances for each month with estimated cash receipts by major classifications and projected disbursements by major account classifications.
- 3.4** Back-office provider will notify the Chief Financial Officer of any shortfall so that the Organization may determine alternative courses of action to rectify the situation.

4.1 BUDGET VS. ACTUAL REPORT

- 4.2** The Budget vs. Actual Report represents a comparison of planned operating expenses to the actual expenses incurred for the period. The objective is to highlight results against plan, percentages and variances and thus provide a basis for management decisions. The Budget vs. Actual Report is prepared and maintained by Back-office provider on a monthly basis.

5.1 FINANCIAL STATEMENTS

- 5.2** The Chief Financial Officer, Chief Executive Officer, and the Board of Directors should review the Financial Statements monthly for each board meeting. This report provides one indication of the performance of the Organization.
- 5.3** The Financial Statements typically are comprised of three main parts: The Statement of Financial Position, Statement of Activities, and the Statement of Cash Flows (Statement of Cash Flows quarterly).

The Statement of Financial Position (Balance Sheet) lists all of the Organization's assets (cash, receivables, deposits, inventory, equipment, intellectual property, etc.), liabilities (debt, lease obligations, etc) and net assets. It identifies the assets (which are "the business") and the financiers, or debt and equity holders and the relationship between the two.

The Statement of Activities represents the Organization's operational sources of cash – revenue – or uses – business expenses and is typically divided into operating periods that represent months, quarters or years of operations. It identifies the profitability of the Organization as a function of the accounting decisions.

The Statement of Cash Flows is the difference between the Statement of Financial Position sources and uses of cash and the Statement of Activities sources and uses of cash. This difference assists in identifying the health of the Organization's operations. It identifies whether the Organization is producing cash or consuming

cash and at what rate and from what sources.

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- 5.4** The Financial Statements should be produced after the close of the Organization's period (see procedure G&A105 PERIOD-END REVIEW & CLOSING). The final Financial Statements form the basis for the Organization's formal presentations to the Board of Directors, or other stakeholders such as banks, outside agencies, or creditors in accordance with procedure G&A109 CONFIDENTIAL INFORMATION RELEASE.

References:**FINANCIAL ACCOUNTING STANDARDS BOARD (FASB)**

Since 1973, the Financial Accounting Standards Board (FASB www.fasb.org) has been the designated organization in the private sector for establishing standards of financial accounting and reporting. Those standards govern the preparation of financial reports. They are officially recognized as authoritative by the Securities and Exchange Commission (Financial Reporting Release No. 1, Section 101) and the American Institute of Certified Public Accountants (Rule 203, Rules of Professional Conduct, as amended May 1973 and May 1979).

FASB pronouncements are the primary sources of GAAP.

GENERALLY ACCEPTED ACCOUNTING PRINCIPLES (GAAP)

A collection of accounting principles. Typically includes the most recent developments of all generally accepted accounting principles (GAAP) as derived or collected from various technical pronouncements. Sources include FASB statements, interpretations, technical bulletins and concepts; American Institute of CPAs (AICPA); Accounting Principles Board opinions, accounting research bulletins, and position statements; and Securities and Exchange (SEC) financial reporting releases.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Revision of responsibilities	Oswaldo Diaz, CFO
2	9/5/17	Revision of wording/clarification of processes	

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SOP # G&A105 Revision: 2
Office Effective Date: 4/7/2022 Approved by: BOD

Prepared by: Central

Title: G&A105 PERIOD-END REVIEW & CLOSING

Policy: An orderly, timely and comprehensive review of all general ledger accounts should be performed or directed by the Chief Financial Officer to ensure an accurate representation of the company's financial statements. These practices are aimed at proving that the financial accounts are accurate, and if not, are properly adjusted to make them accurate, prior to closing.

Purpose: To provide a general overview of the process to be completed for reviewing the accounting records at year-end or any particular month-end prior to closing.

Scope: These practices apply to all accounts. Typically, all financial accounts are reviewed and then closed out as of the company's year-end. Consequently, the procedures that follow are discussed in reference to year-end review. However, a sub-set of these procedures is also applicable to month-end reviews. Month-end procedures are identified near the end of this module.

Responsibilities:

Back-office provider is responsible for creating and reviewing all period-end activities to ensure the period-end financial statements accurately reflect the results of the Organization's activities. All general ledger adjustments should be approved by designated Finance team member.

1.1 CLOSINGS PREPARATIONS

1.2 The following procedures would be expected for monthly closings:

- Reconcile all bank accounts
- Print and compare the aged receivables and payables to the general ledger. Make appropriate adjustments to balance the accounts.
- Review all Statement of Financial Position and Statement of Activities accounts for completeness

- Retain all above reports in a monthly summary file.

2.0 STATEMENT OF FINANCIAL POSITION: ASSETS

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- 2.1 **Cash accounts** - prepare the bank reconciliations for year-end balances per the bank statement to the balance per books for each account. The year-end reconciliation is especially important for preparing the final year-end financial statements to ensure that it is completely accurate.
- Show origination dates and description of each reconciling item. Prepare the necessary journal entries to adjust to the reconciliations. Totals must agree with the general ledger. File all reconciliation reports in the year-end closing file.
- 2.2 **Accounts Receivable** – Print a detailed aged accounts receivable report and reconcile it to the General Ledger. This can be prepared as soon as all accounts receivable are calculated as of year-end. Calculate possible allowances for un-collectible accounts. Adjust prior allowances to calculated amount. Write off any un-locatable differences. Retain a complete copy of the detailed accounts receivable, along with any reconciling adjustments in the year-end closing file.
- 2.3 **Inventory** – Supplies inventory may be small but should be evaluated periodically for cost increases.
- 2.4 **Capital Assets** - Update the detailed schedule of fixed assets with any additions and deletions and reconcile to the general ledger balances.
- 2.5 **Other Assets** - Other assets include utility or real estate deposits, prepaid insurance, advances to employees, and intangibles like store pre-opening costs. These should all be identified and documented. For example, a copy of the initial deposit with the utility company, or a list of the facility pre-opening costs with a schedule showing how much of those costs are to be amortized each year. File copies of these documents in the year-end closing file.

3.0 STATEMENT OF FINANCIAL POSITION: LIABILITIES AND NET ASSETS

- 3.1 Liabilities are shown as the amount to be paid in the subsequent period. If in doubt, record the liability.
- 3.2 **Accounts Payable** - Print a detailed aged accounts payable report and reconcile it to the general ledger. This is generally completed 2 to 4 weeks after the year-end to ensure that all vendor invoices relating to services and merchandise purchased have been received and entered.
- Compare all month-end vendor statements to balances per accounts payable and investigate any differences. Consider making adjustments for any significant

unrecorded liabilities such as work started prior to year-end, but not yet billed by the supplier. Retain a complete copy of the accounts payable detail, along with any reconciling adjustments, in the year-end closing file.

- 3.3 Accrued Expenses** - Review accruals for sales tax, payroll, payroll tax, payroll deductions payable, interest expense on short-term borrowings and long-term debt.
- 3.4 Loan Debt** - Verify recorded accuracy of debt by ensuring the general ledger balances agree to year-end statements from lending institutions. Save all year-end statements in year-end closing file.

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3.5 Contingent Liabilities and Commitments - Prepare a schedule of any outstanding litigation and possible losses. Prepare a schedule of all long-term rental agreements with amounts due by year for the next five years. Retain these schedules in the year-end closing file.

3.6 Net Assets - Record any changes in the Prior Period Adjustment category but ordinarily this account does not have any transactions directly posted to it.

4.1 STATEMENT OF ACTIVITIES: REVENUE & SUPPORT

4.2 Revenue & Support – Review all program revenue, reimbursement billings, and any other donations.

4.3 Additionally, the Chief Financial Officer and back-office provider should periodically review revenue trends, cost associated with revenues, variable expenses and fixed expenses. Look for patterns, new trends, seasonal variances, or profitable emerging products that may indicate changes in customer or program behavior.

4.4 The Chief Financial Officer and back-office provider should analytically review the revenue reports and explain all variances.

5.1 STATEMENT OF ACTIVITIES: EXPENSES

5.2 Each expense total should be compared to expense total from the year before (and budgets if applicable). Attempt to explain any unusual variances. Some expense items are directly related to asset or liability accounts and can be reconciled in conjunction with the related Statement of Financial Position account.

5.3 Program Costs - A detailed report should be produced of program costs and analyzed in relation to the associated revenues and to prior periods.

5.4 Payroll - At year-end, the various payroll expense accounts should agree to total gross payroll per payroll reports. Account for all deductions for W-3 reported to the Social Security Administration, 1099s for vendors, as well as FICA and other taxes reported accordingly.

5.5 Bad Debt Expense - Prepare a list of all accounts written off during the year. Note specifically any addition to the allowance for uncollectible accounts.

5.6 Interest Expense - Prepare a schedule of interest expense by source. Reconcile amounts to short-term borrowings and long-term debt.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider process	Oswaldo Diaz, CFO

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SOP # G&A106 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: G&A106 CONTROLLING LEGAL COSTS

Policy: The Organization will employ various methods to manage and whenever possible, minimize legal expenses.

Purpose: To describe the procedures for managing and controlling associated legal expenses.

Scope: This statement applies to all individuals with the responsibility for contracting legal services and/or approving agreements, contracts, or any other legally associated transactions.

Responsibilities:

Chief Executive Officer will resolve, negotiate, and examine all legal expenses.

Legal Counsel should provide the estimated costs of legal engagements and the most likely outcome.

Definition: Arbitration - is a private, informal process by which all parties agree, in writing, to submit their disputes to one or more impartial persons authorized to resolve the controversy by rendering a final and binding award, which is enforceable in court. It can be used for a wide variety of disputes from commercial transactions to labor grievances.

Declaratory Judgment - is a binding judgment issued by the court that defines the legal relationship between the parties and their rights with respect to the matter before the court. Commonly used in contract disputes (especially useful if no physical agreement exists and or a suit has not been filed yet) to clarify what conduct is permitted or prohibited by the contract or to clarify the contract if necessary.

A declaratory judgment provides the opposing party (defendant) with the opportunity to pick and chose the venue or jurisdiction, and the parties to the litigation. In this manner the opposing party can steal the initiative,

direct the litigation, and maximize its chances of winning.

Procedure:

1.1 ARBITRATION

1.2 Whenever practical, the Organization should utilize arbitration to resolve disputes. Arbitration can significantly reduce the amount of time and legal fees to resolve a dispute. The major features of arbitration are:

- A written agreement to resolve disputes by the use of impartial arbitration. Such a provision can be inserted into a contract for the resolution of possible

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future disputes, or can be an agreement to submit to arbitration of an existing dispute.

- Under the rules of arbitration, the procedure is relatively simple and informal. Strict rules of evidence do not apply; there is no motion practice or formal discovery; no requirements for transcripts of the proceedings or for written opinions of the arbitrators. The rules are flexible and can be varied by mutual agreement of the parties.
 - Impartial and knowledgeable neutrals serve as arbitrators. Arbitrators are selected for specific cases because of their knowledge of the subject matter. Based on that experience, arbitrators can render an award grounded on thoughtful and thorough analysis.
 - Final and binding awards which are enforceable in a court. Court intervention and review is limited by applicable state or federal arbitration laws, and award enforcement is facilitated by these same laws.
- 1.3** The following standard clause should be inserted whenever practical into contracts, agreements, etc. to provide for the arbitration of possible future disputes:

"Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration in accordance with the Commercial [or applicable] Rules of the American Arbitration Association and judgment upon the award rendered by the arbitrator may be entered in any court having jurisdiction thereof."

The arbitration of existing disputes may be accomplished by mutual agreement of parties with the use of the following terminology:

"We, the undersigned parties, hereby agree to submit to arbitration under the Commercial [or applicable] Rules of the American Arbitration Association the following controversy.

We further agree that we will faithfully observe this agreement and the rules, and that we will abide by and perform any award rendered by the arbitrator(s) and that a judgment of the court having jurisdiction may be entered upon the award."

2.1 LEGAL SERVICES

- 2.2** All legal documents prepared for the company's use, such as vendor contracts, employment agreements, sales orders, etc. should be written in common language and whenever possible should avoid the use of legalese or jargon. Legalese tends to complicate even simple arrangements and often unnecessarily requires the incurrence of legal assistance for mere interpretive purposes.

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- 2.3** Before undertaking legal disputes, the Organization's legal counsel should ascertain and inform the Organization of the estimated costs that will be incurred for the legal engagement and the probable or most likely outcome of the case along with the probable amount of any awards or judgments. Use this information to produce a budget and clarify any matters that are increasing the budget. A budget will provide some assurance that the legal counsel has thought the matter through and it will also provide a baseline to determine the legal utility obtained from the matter.
- 2.4** Use legal action only as a last resort. Legal action is frequently not very effective. In fact, a threatened action — particularly with intellectual property — could result in a pre-emptive declaratory judgment lawsuit by the other party thus giving them the “home-field” advantage, which could lead to higher legal costs.

3.1 LEGAL BILLINGS

- 3.2** Consider negotiating a “money-back” guarantee with the right to audit any bill for up to six months. Request that all fees that are proven to be unnecessary or excessive be returned. Then examine all legal bills for any such unnecessary or excessive transactions.
- 3.3** Many times, legal bills are aggregated, vague and too uninformative to be useful in controlling costs. Therefore, all legal arrangements contracted by the Organization should require itemized billings to include the following information:
- Start and end times and dates of each service transaction
 - Detailed description of services provided or work performed
 - Distinct itemization of each individual performing services
- 3.4** Examine all internal discussions or conferences and note exactly who is working on the case and why. Ask for a justification for all attorneys working on the case.
- 3.5** Consider alternatives such as contingent fees, fixed fees, and monthly retainers. All fees are negotiable.

G&A106 Controlling Legal Costs

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

G&A106 Controlling Legal Costs

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Accounting Policies, Procedures and Forms

SOP # G&A107 Revision: 2
Office Effective Date: 9/5/17 **Approved by: BOD**

Prepared by: Central

Title: **G&A107 TAXES AND INSURANCE**

Policy: To ensure compliance with all Federal, state, local, and other regulatory taxation requirements

Purpose: To outline the general areas of taxation. To be used as a checklist or guide in complying with tax requirements related to each specific location and organizational structure.

Scope: This statement applies to the business activities of the company.

Responsibilities:

The Finance team and back-office provider responsible for determining all tax liabilities and fees, and the dates due

Back-office provider is responsible for ensuring the timely payment of all tax liabilities and fees.

Procedure:

1.1 ORGANIZATION FEES AND TAXES

1.2 Fees and taxes will vary depending on the legal structure of the business activity. The Organization is a Not-For-Profit organization; however, there may be from time to time revenue earned that is taxable as if the Organization were a For-Profit entity and those profits would be considered Unrelated Business Income and subject to tax.

1.3 The Finance team and back-office provider should check with the secretary of state, registry of charitable trusts, the IRS, and any other agency that non-profit organizations

may pay fees with in order to ensure all fees are paid in a timely manner. Failure to pay such fees can result in the loss of the company's legal status or structure.

2.1 UNRELATED BUSINESS INCOME TAX

2.2 Activities conducted not related to the exempt purpose of the Organization can be subject to unrelated business income tax.

3.1 PAYROLL FEES AND TAXES

3.2 The Federal and state governments charge an **unemployment tax**, based on a specified minimum amount of each worker's salary level. For most states, the rate can change from business to business depending on the Company's history of claims and the economic health of the state in which the Company is located. Most of Magnolia's schools participate in the School Employers' Fund (SEF) for unemployment insurance.

3.3 **Worker's compensation insurance** may be imposed by a state like a tax. It can also vary based on the amount of payroll, past history of worker's compensation claims, and the type of work in which the business is engaged. This coverage is generally arranged through an insurance company.

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- 3.4** At the Federal level, payroll is taxed at a uniform rate for **Social Security** and **Medicare**. These two taxes are evenly shared between the company and the employee up to certain levels of income. Additionally, personal income taxes, based on the employee's compensation, must be **withheld** from the employee's earnings and remitted to the government by the company, along with the company's and employee's share of **Social Security** and **Medicare** taxes.
- 3.5** In California, a portion of the employee's compensation is also **withheld** and remitted to the state by the Organization.
- 3.6** Other payroll withholdings, mandated by Federal or state requirements, may require wage garnishments to fulfill a bankruptcy edict or childcare payment requirement.
- 3.7** The Treasury Department and or the Internal Revenue Service (IRS) collects all monies due the Federal Government. Technically, withholding amounts deducted from a paycheck are considered the government's money and the business owner is temporarily holding the money, in deposit, until it can be transferred to the government. Any failure to pay in a timely fashion is considered a serious matter by the IRS and will not be ignored.

The IRS will impose a penalty for failing to pay the required withholding amounts on time. In addition, interest will be charged until the amount is paid. Both interest and penalties imposed by the IRS can add up significantly.

Therefore, the IRS is not a good source to "borrow" money from if cash is tight.

Note: Money due the IRS is NOT dischargeable in bankruptcy.

- 3.8** Certain local municipalities charge an **Earnings tax** based on payroll, income, assets, stock options granted or any combination. Check with the city clerk for details.

4.1 EXCISE TAXES

- 4.2** There are many different federal government taxes or fees imposed on the commerce of different types of businesses. The following represents the most common.

- 4.3** Penalties and interest may result from any of the following acts.

- Failing to collect and pay over tax as the collecting agent.
- Failing to keep adequate records.
- Failing to file returns.
- Failing to pay taxes.
- Filing returns late.
- Filing false or fraudulent returns.
- Paying taxes late.

- Failing to make deposits.

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- Depositing taxes late.
- Making false statements relating to tax.
- Failing to register.

5.1 OTHER TAXES AND CREDITS

5.2 Many state, counties, and cities impose **real estate taxes**. The Organization should ensure that where possible the Organization has applied for exemption from property taxes as a non-profit organization.

5.3 **Sales and Use Taxes** – at this time, the Organization does not sell any products and is not subject to sales tax. However, they may make purchase from out of state vendors that are subject to California Use Tax. Such expenditures are monitored and reported, and payment is remitted quarterly to the Board of Equalization.

6.1 TAX PAYMENTS

6.2 The Finance team should create and maintain a detailed tax calendar as a guide, which provides a sample guide to some of the most common taxes. The guide should serve a reminder of tax due dates.

7.1 INSURANCE

7.2 Insurance needs for a business can be grouped in two broad categories, those that are directed at safeguarding assets and those that are furnished as employee benefits. Employee benefit insurance such as, health insurance, disability insurance and key man life insurance, should be considered in light of its importance in the entire employee compensation mix and in light of the personal needs of the company's owner(s).

7.3 Insurance used for safeguarding company's assets includes: property, casualty, key-man and professional liability insurance, as well as auto insurance, errors and omissions, directors' liability or business interruption insurance. The levels and terms of these policies should be determined based upon the value of the assets at risk and creditor or state and local requirements.

7.4 Business with a lot of employees should consider employment practices liability insurance covers businesses against some types of employee lawsuits including:

- Sexual harassment
- Discrimination
- Wrongful termination
- Breach of employment contract
- Negligent evaluation
- Failure to employ or promote

- Wrongful discipline
 - Deprivation of career opportunity
-

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- Wrongful infliction of emotional distress
- Mismanagement of employee benefit plans

7.5 Certificates of insurance may be required to be on file or on display depending on governmental requirements. It is important to consider that the insurance policy is a contract. Each year's policy should be saved in a permanent file. A product liability suit can go back many years, and if the potential claim is significant, the protection afforded by the prior year's insurance coverage will be improved if that year's policy has been saved.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, CFO
2	9/5/2017	Revise to clarify procedures	

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SOP # G&A108 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A108 PROPERTY TAX ASSESSMENTS

Policy: All property tax assessments will be reviewed for accuracy and proper assessed valuations to ensure minimum property tax costs to the Organization.

Purpose: To outline the areas for review in assessments and methods for appealing overstated assessments. A Non-Profit property tax exemption is the preferred method to minimize property taxes.

Scope: This statement applies to the Finance Department for property tax assessments for all sites owned by the Organization.

Responsibilities:

The Chief Financial Officer is responsible for reviews of Assessments including the review of Property Descriptions, validating record accuracy and submitting appeals to local Assessor's Offices.

Procedures:

1.1 REVIEW OF ASSESSMENTS

1.2 All assessments are to be promptly reviewed. Many jurisdictions only allow a challenge to an assessment within 30 days after the annual notice of assessed value is sent. If the Finance Department misses the deadline, the Organization loses the chance to reduce the year's property taxes. There are normally no refunds for prior years' property taxes even if successfully challenged in the future. Often, it may be advisable to begin the analysis process prior to receiving the assessment notice.

1.3 When reviewing an assessment, the first step is to find out how the property was assessed. Ask for a full explanation of how the assessed value was derived. Assessors are usually cooperative in providing this information.

1.4 Upon receipt of the basis for assessment, the following factors should be reviewed:

Note: Do not make the mistake of thinking property has received a favorable low assessment just because its assessed value is less than its market value. Many jurisdictions use "assessment ratios" that are a percentage of market value. What is important is the amount of a property's assessment compared to those of similar properties. A below market assessment may in fact be very high.

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- **Research Similar Properties:** Tax assessments are part of the public record. Assessments of similar properties to the Organization's should be looked up to see that the Organization's assessment is in line. The objective is to find assessed values for similar properties that are far lower than the Organization's. For example, organization locations within industrial parks or similar developments should be easy to find very similar properties for comparison.
- **Review Property Descriptions and Accuracy of Records:** Review records for possible clerical errors. Ensure that property descriptions are correct and the building size (total square feet) is not overstated. Make sure that all dates are correct and that all calculations are properly computed. A wrong construction date or simple mathematical error can increase tax valuations.
- **Deflate Property Valuations:** Tax assessors generally value property on the basis of historical cost and the recent sales prices of other properties in the area. Often, when figuring local property taxes, numbers reported on the federal tax return will be used. Depreciable assets are valued at cost on the federal return when figuring depreciation deductions. However, the appropriate assessment for market value for property tax purposes may very different. Further, instead of performing actual physical inspections or assessments of properties every year, local assessors use "equalization ratios" to adjust the annual assessment. The equalization ratio is a type of an inflation adjustment meant to reflect the current general trend in property values. However, the current trend in property values may not apply to the Organization's property.

1.5 If the Organization can provide solid reasons for using different measures to value property, it may be able to receive a reduction in property taxes. Possible valuation methods can include:

- **Income Production:** Measure the current value of the cash flow stream generated by the property, which may be substantially lowered during a recession.
- **Replacement or Reproduction Cost:** How much it would cost to replace or reproduce the property should be determined. For example, if the construction industry is in a downturn, the cost to replace the property may be less than what the Organization paid for the property.
- Also the Organization should evaluate if it incurred any construction cost overruns due to bad weather, labor disturbances, material shortages, etc., that may have increased the cost of a new building without adding to its value. Decorative features may also add much less value than their actual cost.
- **Market Prices:** The actual recent sales of similar properties may show that

the Organization's property is over-assessed.

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- **Unique Features or Business Obsolescence:** Changes to the characteristics of the property or features specific to the Organization's business may reduce its value. Examples can include:
 - Change in zoning restrictions that limit the use of the property.
 - Changes in neighborhood logistics, such as a median divider placed in a highway that deprives a location from access to customers, rerouting of a highway, closing of a railroad line or economic decline in the area that forces the Organization's traditional customer base to move away.
 - Obsolete design for the Organization's particular business needs such as a facility that has been specially designed to hold machinery that has been made obsolete by a competitor's innovation or a communications facility built with conventional wiring that is obsolete due to a switch in the industry to the use of fiber optics.
 - Unique design aspects which meet Organization needs but would reduce the value of a property to others.
 - A general downturn in the Organization's industry.
 - Including Personal Property in Building Valuations: Property that is movable is personal property and should not be included in a valuation of the building. Many items such as piping, wiring, climate control systems, generators, special supports and foundations for equipment may look like part of the building to the assessor but should not be included in the building's assessment.
- 1.6 Where the Organization is renting classroom or other facilities with triple net leases that includes property taxes that the Organization paid, the Organization should consider evaluating the lease location for the possibility that the landlord has not lowered the property taxes or is charging an unfair higher property tax to the Organization.
- 1.7 Under all circumstances the Organization should seek a property tax exemption or waiver. Often times the County will assess taxes for the first year, and the waiver will apply thereafter.
- 2.1 APPEALING OF ASSESSMENTS**
- 2.2 If upon review of the assessment and all other factors, the Finance Department believes a downward adjustment to the property assessment is appropriate, an appeal should be prepared. Experience has shown that if an organization presents a

sound argument for challenging an assessment, the Organization has an excellent chance of receiving some type of tax reducing adjustment even if it is less than the Organization had requested.

- 2.3 The appeal case should include documentation of the above findings. It is important to keep in mind that the property tax assessor may not be familiar with

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the details of the Organization's business or industry, so the Organization must prepare to explain how such factors may affect a property's value.

- 2.4 Once a sound case is prepared, an appeal can be sought by simply calling the local assessor's office and asking for an appointment to discuss the assessment. The meeting with the local assessor will generally be informal. It is important to not be adversarial with the assessor but to present the attitude that the Organization is helping the assessor to reach a more accurate valuation for the property by presenting additional information.
- 2.5 If the Organization does not receive any or a large enough adjustment, an appeal may be made with the local Board of Appeals. These meetings will probably be more formal and the Organization may wish to provide expert testimony or obtain an independent appraisal of the property to present to the Board of Appeals.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

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SOP # G&A109 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: G&A109 CONFIDENTIAL INFORMATION RELEASE

Policy: The release of financial, statistical or other information that may be of a confidential nature to the Organization should be controlled. Individual requests should be referred to the Chief Financial Officer, or appropriate manager for disposition.

Purpose: To provide a means for the control of information to banks, media, credit bureaus, or other agencies and organizations.

Scope: All requests by an outsider to an employee regarding financial, revenue, marketing, customers, personnel, vendors, or other Organization confidential information. If in doubt, verify with the Chief Financial Officer

Responsibilities:

Chief Financial Officer is responsible for safeguarding all Organization information and determining the appropriate level of detail for release.

The Finance Department shall oversee all responses to all reference requests.

Procedure:

1.1 FINANCIAL INFORMATION REQUESTS

1.2 Typical written requests are for additional information concerning details of the published financial statements, litigation progress, insurance coverage, names of investors, etc. If the request is by letter or other written correspondence, the material shall be forwarded to the Chief Financial Officer who will decide what information may be released and who will be authorized to reply.

1.3 If the request is by telephone or a personal visit to our office, the requester should be referred to the Chief Financial Officer. If either is unavailable, the requester should be asked to provide their name, Organization, telephone number and address, if possible. Also they should be asked the reason for the request and a brief

description of the information desired. This information should be written down and forwarded to the Chief Financial Officer for follow-up.

- 1.4** The Chief Financial Officer should determine the appropriate response for each request. Formal Financial Statement presentations to the Board of Directors, or other stakeholders such as banks, should be accompanied by an opinion or comment from the Organization's Certified Public Accountant (CPA) prior to any formal presentation. (If no outside CPA review is obtained then some people may

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consider the Financial Statements as “Pro-Forma” and then request copies of completed tax returns). The Chief Financial Officer or designated Finance team member will examine the Financial Statements and prepare a formal version to one of three standards: compiled, reviewed or audited. The Organization should use an economically appropriate CPA standard sufficient to satisfy outside requirements.

The CPA standards are as follows:

- Compiled Financial Statement. The CPA is unable to make any assurances on the data or methods used to produce the financial statements. The CPA will re-cast the financial statements into a standard format (as per Generally Accepted Accounting Principles or GAAP) with a disclaimer that the statements are un-audited and the information is solely derived from the management of the business entity.
- Reviewed Financial Statement. The CPA is able to make some limited assurances that material changes are not required in order for the Financial Statements to be in conformity with GAAP. The CPA uses limited inquiry and some analytical procedures to ascertain the reasonableness of the statements. The information is then re-cast into a standard format with appropriate footnotes and a disclaimer that the statements are un-audited and only a limited inquiry has been made into the reasonableness of the information.
- Audited Financial Statement. The CPA provides assurance, through an opinion letter, that the financial statements are a fair representation of the financial position, results of operations, and cash flows of an entity. This opinion is given after a detailed review and verification of the accounting records and processes used to produce the data. Verification steps include various analytical procedures, client surveys, third party confirmation, and detailed accounting record reviews.

Any irregularities found could lead to either a “qualified” opinion, to indicate that something is inconsistent with GAAP, or an “adverse” opinion, which calls into question the reliability of the information itself. The CPA considers an adverse opinion very serious.

- 1.5** Some types of confidential information may require the signing of G&A 109 Ex 1 NON-DISCLOSURE AGREEMENT, prior to release. This may include requests for product release schedules, development plans, elements of corporate strategy, customer lists, intellectual property, financial information, legal proceedings, or time sensitive information.

2.1 PERSONNEL INFORMATION REQUESTS

- 2.2** The Office Manager shall oversee all responses to all reference requests. No other employee, including a former employee’s immediate supervisor, shall be authorized to respond independently without first obtaining approval from Human Resources.

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- 2.3** All requests should be in writing, using Organization letterhead, indicating in that letter that the subject of the reference request has applied for a job. Information is not to be provided over the phone.
- 2.4** Each response shall be obtained only from people with first-hand knowledge of the employee's performance.
- 2.5** The Office Manager shall review all responses to ensure that:
- Only factual information about the employee's job performance and qualifications for employment are included in the response. At no time should a response include emotions, personal feelings, rumors, non-work-related comments or exaggerations.
 - If at all possible it is important that some form of documentation or solid evidence supports all information provided in the response.
- 2.6** Retain a copy of all responses, including the contents of any oral response, in the former employee's personnel file.
- 3.1 CREDIT REFERENCE INQUIRIES**
- 3.2** All credit reference requests should be in writing. Information requests should be directed to the Office Manager and are not to be provided over the phone.
- 3.3** The Office Manager should review the Credit Inquiry form for completeness prior to responding. Retain a copy of all responses, including the contents of any oral response, in the customer's file.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revised to clarify processes	

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G&A109 Ex1 NONDISCLOSURE AGREEMENT

This NONDISCLOSURE AGREEMENT is made and entered into as of (DATE) between (THE ORGANIZATION NAME, STATE OF INCORPORATION AND ADDRESS), and (OTHER PARTY NAME, STATE OF INCORPORATION AND ADDRESS).

1. **Purpose.** The parties wish to explore and/or implement a business opportunity of mutual interest, and in connection with this opportunity, each party may disclose to the other certain confidential technical and business information that the disclosing party desires the receiving party to treat as confidential.

2. **"Confidential Information"** means any information disclosed by either party to the other party, either directly or indirectly, in writing, orally or by inspection of tangible objects (including, without limitation, documents, prototypes, samples, plant and equipment) that is designated as "Trade Secret", "Confidential", "Proprietary" or some similar designation, or is of such a nature or has been disclosed in such a manner that it should be obvious to the receiving party that such is claimed as confidential. Information communicated orally shall be considered Confidential Information within a reasonable time after the initial disclosure. Confidential Information may also include information disclosed to a disclosing third party by third parties. Confidential Information includes, without limitation, a disclosing party's trade secrets, know-how, intellectual property and proprietary information as well as business plans, financial data and the status and terms of any discussions between the parties regarding a potential business transaction. Confidential Information shall not, however, include any information that (i) was publicly known and made generally available in the public domain prior to the time of disclosure by the disclosing party; (ii) becomes publicly known and made generally available after disclosure by the disclosing party to the receiving party through no action or inaction of the receiving party; (iii) is already in the possession of the receiving party at the time of disclosure by the disclosing party as shown by the receiving party's files and records immediately prior to the time of disclosure; (iv) is obtained by the receiving party from a third party without a breach of such third party's obligations of confidentiality; (v) is independently developed by the receiving party without use of or reference to the disclosing party's Confidential Information, as shown by documents and other competent evidence in the receiving party's possession; or (vi) is required by law to be disclosed by the receiving party, provided that the receiving party gives the disclosing party prompt written notice of such requirement prior to such disclosure and assistance in obtaining an order protecting the information from public disclosure.

3. **Non-use and Non-disclosure.** Each party agrees not to use any Confidential Information of the other party for any purpose except to evaluate and engage in discussions concerning a potential business relationship between the parties. Each party agrees not to disclose any Confidential Information of the other party to third parties or to such party's employees or agents, except to those employees or agents of the receiving party who are required to have the information in order to evaluate or engage in discussions concerning the contemplated business relationship. A receiving party shall be responsible and liable for the action of its employees and agents with respect to a disclosing party's Confidential Information and shall fully cooperate with the disclosing party in enforcing any rights of the disclosing party against any such person in connection with a breach of this Agreement. Neither party shall reverse engineer, disassemble or de-compile any prototypes, software, or other tangible objects that embody the other party's Confidential Information and that are provided to the party hereunder. Neither party shall hire any employees of the

other during the term of this Agreement and for a period of two years thereafter.

4. Maintenance of Confidentiality. Each party agrees that it shall take reasonable measures to protect the secrecy of and avoid disclosure and unauthorized use of the Confidential Information of the other party. Without limiting the foregoing, each party shall take at least those measures that it takes to protect its own highly confidential information and shall ensure that its employees and agents who have access to Confidential Information of the other party have signed a Non-use and Non-disclosure agreement in content similar to the provisions hereof, prior to any disclosure of Confidential Information to such employees and agents. Neither party shall make any copies of the Confidential Information of the other party unless the other party previously approves the same in writing. Each party shall reproduce the other party's proprietary rights notices on any such approved copies, in the same manner in which such notices were set forth in or on the original.

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5. Ongoing Development. Nothing in this Agreement shall prohibit or restrict either party's right to develop, use or market products or services similar to or competitive with those of the other party disclosed in the Confidential Information as long as such shall not otherwise be a breach of this Agreement. Each party acknowledges that the other may already possess or have developed products or services similar to or competitive with those of the other party disclosed in the Confidential Information. Each party shall remain free to use in the course of its business its general knowledge skills and experience incurred before, during or after the date of this Agreement and the activities hereunder.

6. No Obligation. Nothing herein shall obligate either party to proceed with any transaction between them and each party reserves the right, in its sole discretion, to terminate the discussions contemplated by this Agreement concerning the business opportunity. Upon termination of such discussions the parties shall return all Confidential Information as provided in paragraph 8 and shall have no further rights to evaluate or use the Confidential Information of each other for any purpose whatsoever.

7. No Warranty. ALL CONFIDENTIAL INFORMATION IS PROVIDED "AS IS." THE PARTIES MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS, IMPLIED OR OTHERWISE, REGARDING THE ACCURACY, COMPLETENESS OR PERFORMANCE OF ANY OF ITS RESPECTIVE CONFIDENTIAL INFORMATION.

8. Return of Materials. All documents and other tangible objects (except for any tangible objects purchased by a party) containing or representing Confidential Information that have been disclosed by either party to the other party, and all copies thereof which are in the possession of the other party, shall be and remain the property of the disclosing party and shall be promptly returned to the disclosing party upon the disclosing party's written request.

9. No License. Nothing in this Agreement is intended to grant any rights to either party under any patent, mask work right, trademark, trade secret or copyright of the other party, nor shall this Agreement grant any party any rights in or to the Confidential Information of the other party except as expressly set forth herein.

10. Term. The obligations of each receiving party hereunder shall survive until such times as all Confidential Information of the other party disclosed hereunder becomes publicly known and made generally available through no action or inaction of the receiving party. Notwithstanding the surviving obligations of a receiving party to maintain the confidentiality of a disclosing party's Confidential Information either party may at any time given written notice to the other party that it does not desire to receive any additional Confidential Information from the other party. After receipt of such notice, such party shall no longer furnish its Confidential Information to the notifying party.

11. Remedies. Each party agrees that any violation or threatened violation of this Agreement may cause irreparable injury to the other party, entitling the other party to seek injunctive relief in addition to all other

legal and equitable remedies.

12. **General Provisions.** This Agreement shall bind and inure to the benefit of the parties hereto and their successors and assigns. This Agreement shall be governed by the laws of the State of Missouri, without reference to conflict of laws principles. This document contains the entire Agreement between the parties with respect to the subject matter hereof. Any failure to enforce any provision of the Agreement shall not constitute a waiver thereof or of any other provision. This Agreement may not be amended, nor any obligation waived, except by a writing signed by both parties hereto.

(THE ORGANIZATION).

(THE OTHER PARTY)

By: Name:

By: _____ Name: _____

Ti _____
tle: _____

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SOP # G&A110 Revision: 0
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: G&A110 DOCUMENT CONTROL

Policy: All documents used to provide work direction or set policy should be reviewed, approved, distributed and controlled by the office of the Chief Financial Officer.

Purpose: To define the methods and responsibilities for controlling documents used to provide work direction or set policy, and to define methods for document revision, approval, and distribution.

Scope: This procedure applies to all documents required by the Accounting Management System. Documents of internal or external origin are included.

Responsibilities:

The Chief Financial Officer is responsible for controlling and reviewing, at least annually, the Accounting Manual, all procedures and instructions related to the Accounting Management System, and all External Documents that are required.

The Finance Team is responsible for maintaining and controlling the Accounting Manual, all procedures and instructions related to the Accounting Management System, and all External Documents that are required.

School Principals are responsible for ensuring the relevant versions of documents are available at the points of use and that they are legible.

Definitions: Controlled Document: A document that provides information or direction for performance of work is that is within the scope of this procedure. Characteristics of control include such things as Revision Number (letter), Signatures indicating review and approval, and Controlled Distribution.

Document: Information and its supporting medium. The medium can be paper, magnetic, electronic, optical computer disc, photograph, or sample.

External Document: A document of external origin that provides information or direction for the performance of activities within the scope of the quality management system. Examples include but are not limited to: customer drawings, industry standards, international standards, or equipment manuals.

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Procedure:**1.1 DOCUMENT DISTRIBUTION**

1.2 Federal, State, and Local grants and contracts should be controlled. It is up to the Chief Executive Officer, Chief Financial Officer, and Chief Operations Officer to dispose of previous revisions as new revisions are released.

1.3 Each applicable department is responsible for maintaining each department's controlled documents. Examples of external documents include Memorandums of Understanding that may be used or referenced.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	

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G&A110 Ex1 REQUEST FOR DOCUMENT CHANGE (RDC)

Date: _____ RDC No.: _____

Originator: _____

Document Title and Publication Date: _____

Page and Chapter, or Paragraph Number: _____

Description Of Problem, Opportunity Or Reason For Request (Define in Detail):

Solution Recommended (if known) Date Action Required by: _____

Comments: _____

Department Manager Approval: _____
Recommended Solution to Problem or Postponement/Dissolution of Request
(attach all necessary documentation to support response) _____

Approved By: _____ Date: _____

PROCEDURE FOR COMPLETING FORM

- 1) Complete top section of this form except for RDC number
- 2) Obtain Department Manager's approval
- 3) Forward original to the Office Manager who will assign a RDC number (Note: one copy will be returned to originator with RDC number assigned.
- 4) The Office Manager will take action and if appropriate will proceed with an RDC.
- 5) The Office Manager returns a copy to Originator upon resolution of request.

Distribution: Original - RDC File Copy 1 - Originator

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G&A110 Ex2 DOCUMENT CHANGE CONTROL

Date: _____

DCN#: _____

RDC#: _____

Doc. or Part No.	Description of Change, Documents affected and reason(s) for change(s)	Action Code(s)	Effective Date

Change Action Required

Make/order New Document: _____

Current Docs:

Use until depleted

Return for Credit

Scrap

Save for spares

Other: _____

Comments: _____

Authorization(s): Chief Financial Officer

Authorization(s): Office Manager

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

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SOP # G&A111 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A111 FACSIMILE AND E-MAIL SIGNATURES

Policy: Fax and E-mail signatures are accepted as if the signature were an authentic wet blue ink signature for any official document.

Purpose: The purpose of this policy is to provide a clear explanation of the guidelines surrounding the use of Fax and E-mail signatures on Organization provided and received E-mail accounts and Fax Documents.

Scope: This applies to all Organization E-mail and Fax documents.

Responsibilities:

Chief Financial Officer is responsible for review and approval of signatures.

Background: E-mail and fax communication are often used more than any other form of communication, is a form of business communication. The format of E-mail and fax documents should be professional in terms of signature and other formatting. E-mail and fax signatures should follow certain guidelines to fit with the overall image of the Organization. As such, the style of address, tone, spelling, grammar and punctuation of all messages should reflect the standards of formal business communication.

Procedure:

1.1 FAX AND E-MAIL SIGNATURES

1.2 What should be included in an e-mail signature:

E-mail and fax signatures should include your name, job title, department, mailing address, telephone and fax numbers, and Web site address. This should be in plain text format to easily accommodate all types of users.

When the signature is for a contract or approving a document or official in any nature, the signature should only be acceptable if the signature is in original “blue” ink.

1.3 What should not be included in a fax or e-mail signature:

Elements that should not be included in fax or e-mail signatures include colored text, very large or complicated fonts, images, clip art or personal quotes. Faculty

G&A111 Fax and E-mail Signatures Accepted
Accounting Policies, Procedures and Forms

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and staff should also refrain from using background images or stationary in their e-mail correspondence.

- 1.4** No fax or e-mail document is considered officially received as if it were an original blue ink wet signature until after the Organization has sent a formal reply to the fax or e-mail that the signature has been accepted.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

G&A111 Fax and E-mail Signatures Accepted
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SOP # G&A112 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A112 MAINTENANCE REQUESTS

Policy: Any maintenance work must be approved and pre-authorized.

Purpose: The purpose of this policy is to provide a clear explanation of the guidelines in obtaining approval for building, equipment, and general maintenance services.

Scope: This applies to any and all maintenance type service requests.

Responsibilities:

Chief Financial Officer or the Chief Financial Officer's staff designee is responsible for review and approval of maintenance requests.

Background: MERF and/or its maintenance contractors has the responsibility to repair, make replacements and adjust equipment and buildings in response to conditions discovered during performance of preventive maintenance, equipment breakdown/improper operation or employee complaint. MERF and/or its maintenance contractors shall respond to and accomplish any request that is relevant to the successful operation of the Organization and its school and system locations.

Procedure:

1.1 MAINTENANCE REQUESTS

1.2 Maintenance requests will be reviewed and approved or disapproved by the Chief Financial Officer and/or the designated staff as appropriate.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

Accounting Policies, Procedures and Forms

SOP # G&A113 Revision: 1
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: G&A113 ELECTRONIC BACKUP OF ACCOUNTING INFORMATION

Policy: All electronic accounting information systems must be backed up every week at a minimum on the Organization's server.

Purpose: The purpose of this policy is to provide a clear explanation the need to backup electronic accounting data regularly.

Scope: This applies to the Schoolabilty accounting program.


Responsibilities:

The Finance Department is responsible for ensuring that the accounting program information is properly backed up.

Background: Electronic Accounting Information Backup means measures should be adopted that ensures that all electronic accounting data is properly backed up to secondary sources such as off-site web based services and/or other media to protect the Organization's information in the event of any form of electronic data loss.

Procedure:

1.1 ELECTRONIC BACKUP OF ACCOUNTING INFORMATION

1.2  The electronic accounting information should be backed up ~~by using two means.~~

~~Full backups are taken daily at approximately 1:45 a.m. Pacific Time using our current accounting and budgeting systems.~~

~~On a weekly basis, the Finance team should perform a QuickBooks backup of the data using the QuickBooks software procedure. This backup copy should be stored on the Organization computer server. The Organization computer server with the QuickBooks accounting file should be backed up weekly.~~

G&A113 Electronic Backup of Accounting Information
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	4/7/22	Electronic Back-up of Accounting Information	Steve Budhaja, CFO

Accounting Policies, Procedures and Forms

SOP # G&A114 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A114 POLITICAL INTERVENTION

Policy: Consistent with its tax-exempt status under the Internal Revenue Code, it is the policy of MERF that the Organization shall not incur any expenditure for political intervention. Political intervention does not include lobbying activities, defined as the direct or indirect support or opposition for legislation, which is not prohibited under the Internal Revenue Code.

Purpose: The purpose of this policy is to provide a clear explanation of what the Organization may and may not be involved in with regards to politics.

Scope: All political activities of the Organization.

Responsibilities:

Chief Executive Officer is responsible for ensuring that the Organization is not seen as a political organization.

Background: The Organization is very well known and as such, political candidates may seek endorsements from MERF. This policy clarifies what MERF can and cannot do with regards to politics.

Definition: Political Intervention shall be defined as any activity associated with the direct or indirect support or opposition of a candidate for elective public office at the Federal, California or local level.

Procedure:

1.1 PROHIBITED EXPENDITURES

1.2 Examples of prohibited political expenditures include, but are not limited to, the following:

1. Contributions to political action committees
2. Contributions to the campaigns of individual candidates for public office
3. Contributions to political parties
4. Expenditures to produce printed materials (including materials included in periodicals) that support or oppose candidates for public office
5. Expenditures for the placement of political advertisements in periodicals

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MERF will comply with all Federal and State laws and regulations regarding political intervention, lobbying, etc. Federal funds and those assets paid for by this program may not be used in any partisan activity.

2.1 ENDORSEMENTS OF CANDIDATES

2.2 It is the policy of MERF not to endorse any candidate(s) for public office in any manner, either verbally or in writing. This policy extends to the actions of management and other representatives of MERF, when these individuals are acting on behalf of, or are otherwise representing, MERF.

3.0 PROHIBITED USE OF ASSETS AND RESOURCES

3.1 It is the policy of MERF that no assets or human resources of MERF shall be utilized for political activities, as defined above. This prohibition extends to the use of MERF assets or human resources in support of political activities that are engaged in personally by board members, members of management, employees, or any other representatives of MERF. While there is no prohibition against these individuals engaging in political activities personally (on their own time, and without representing that they are acting on behalf of MERF), these individuals must at all times be aware that MERF resources cannot at any time be utilized in support of political activities except as identified in “1.0” above.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

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SOP # G&A115 Revision: 1
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: G&A115 ACCRUED LIABILITIES

Policy: The Organization will establish a list of commonly incurred expenses that may require accrual at the end of the fiscal year accounting period.

Purpose: The purpose of this policy is to properly recognize and accrue liabilities.

Scope: This applies to potential liabilities.

Responsibilities:

The Senior Controller & Financial Analysts with the support of Back-office provider are responsible for ensuring that the accrued liabilities are properly accounted for.

Background: Accrued liabilities are liabilities that have been incurred such as vacation pay but have not been paid.

Procedure:

1.1 Accrued Liabilities

1.2 Some of the expenses that shall be accrued by MERF at the end of an accounting period are:

- Salaries and wages
- Payroll taxes
- Vacation pay/Compensated absences
- Rent
- Interest on notes payable
- Insurance premiums
- Audit fees
- Charter Management Organization fees

G&A115 Accrued Liabilities
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider	Oswaldo Diaz, CFO
2	4/7/22	Updated to include Senior Controller	Steve Budhraj, CFO

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SOP # G&A116 Revision: 1
Office Effective Date: 11/12/15 Approved by: BOD

Prepared by: Central

Title: G&A116 NOTES PAYABLE

Policy: It is the policy of MERF to maintain a schedule of all notes payable, mortgage obligations, lines of credit, and other financing arrangements. This schedule shall be based on the underlying loan documents.

Purpose: The purpose of this policy is to properly track and recognize all notes payable and other similar obligations.

Scope: This applies to notes, loans, lines of credit, and obligations of the Organization.

Responsibilities:

Back-office provider is responsible for ensuring that all notes, loans, and other similar obligations are properly accounted for.

Background: Properly tracking and monitoring long term debt such as loans is important such that as payments become due, the Organization has sufficient cash flow to honor the obligation.

Procedure:

1.1 NOTES PAYABLE

1.2 Prepare a schedule that shall be based on the underlying loan documents and shall include all of the following information:

1. Name and address of lender
2. Date of agreement or renewal/extension
3. Total amount of debt or available credit
4. Amounts and dates borrowed
5. Description of collateral, if any
6. Interest rate
7. Repayment terms
8. Maturity date
9. Address to which payments should be sent
10. Contact person at lender
11. Loan covenants, if applicable

2.1 ACCOUNTING AND CLASSIFICATION

2.2 An amortization schedule shall be maintained for each note payable. Based upon the amortization schedule, the principal portion of payments due with the next

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year shall be classified as a current liability in the statements of financial position of MERF. The principal portion of payments due beyond one year shall be classified as long-term/non-current liabilities in the statements of financial position.

- 2.3** Demand notes and any other notes without established repayment dates shall always be classified as current liabilities.

Unpaid interest expense shall be accrued as a liability at the end of each accounting period.

- 2.4** A detailed record of all principal and interest payments made over the entire term shall be maintained with respect to each note payable. Periodically, the amounts reflected as current and long-term notes payable per the general ledger shall be reconciled to these payment schedules and the amortization schedules, if any, provided by the lender. All differences shall be investigated.

3.1 NON-INTEREST-BEARING NOTES PAYABLE

- 3.2** As a charitable organization, MERF may from time to time receive notes payable that do not require the payment of interest, or that require the payment of a below-market rate of interest for the type of obligation involved. In such cases, it shall be the policy of MERF to record contribution income for any unpaid interest.

- 3.3** For demand loans, recording of interest expense and contribution income shall be performed at the end of each accounting period, based on the outstanding principal balance of the loan during that period, multiplied by the difference between a normal interest rate for that type of loan and the rate, if any, that is required to be paid by MERF.

- 3.4** For loans with fixed maturities or payment dates, the note payable shall be recorded at the present value of the future principal payments, using as a discount rate the difference between a normal interest rate for that type of loan and the rate, if any, which is required to be paid by MERF. The difference between the cash proceeds of the note and the present value shall be recorded as contribution income in the period the loan is made. Thereafter, interest expense shall be recorded in each accounting period using the effective interest method, with the corresponding credit entry increasing the note payable account to reflect the amount(s) that shall be repaid.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Changes in responsibilities	Oswaldo Diaz, CFO

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SOP # G&A117 Revision: 2
Office Effective Date: 9/5/17 **Approved by: BOD**

Prepared by: Central

Title: **G&A117 FINANCIAL AND TAX REPORTING**

Policy: The Organization will prepare annual and monthly financial statements as management considers necessary and prepare non-profit tax information and tax information returns within eight months of the fiscal year close.

Purpose: The purpose is to control and prepare consistent and accurate financial statements and tax returns that are relied upon by both internal and external parties.

Scope: This applies to financial statements and tax reporting documents.

Responsibilities:

Chief Financial Officer or his designee is responsible for preparing all tax documents and ensuring Organization financial statements are accurate.

Back-office provider is responsible for preparing all Organization financial statements.

Background: Preparing financial statements and communicating key financial information is a necessary and critical accounting function. Financial statements are management tools used in making decisions, in monitoring the achievement of financial objectives, and as a standard method for providing information to interested parties external to MERF. Financial statements may reflect year-to-year historical comparisons or current year budget to actual comparisons.

Procedure:

1.1 STANDARD FINANCIAL STATEMENTS

1.2 Prepare the basic financial statements at year end and as considered necessary for reporting purposes. The basic financial statements of the Organization are maintained and prepared by MERF on an Organization wide basis and shall include:

1. **Statements of Financial Position** - reflects assets, liabilities and net assets of MERF and classifies assets and liabilities as current or non- current/long-term.
2. **Statements of Activities** - presents support, revenues, expenses, and other changes in net assets of MERF, by category of net asset (unrestricted, temporarily restricted and permanently restricted)

2.1 FREQUENCY OF PREPARATION

2.2 The objective of the Back-office provider is to prepare accurate financial statements in accordance with generally accepted accounting principles and distribute them in a timely and cost-effective manner. In meeting this responsibility, the following policies shall apply:

2.3 A standard set of financial statements described in the preceding section shall be produced on a quarterly basis for presentation at the Board of Directors meeting. The standard set of financial statements described in the preceding section shall be supplemented by the following schedules:

1. Individual statements of activities on a departmental and functional basis (and/or program/grant basis)
2. Comparisons of actual year-to-date revenues and expenses with year-to-date budgeted amounts

The bi-monthly set of financial statements shall be prepared on the cash basis of accounting with exception of year-end reports where accrual method of accounting must be used. Year-end report must include all receivables, accounts payable received by the end of the reporting period, and actual depreciation expense.

3.1 REVIEW AND DISTRIBUTION

All financial statements and supporting schedules shall be reviewed and approved by the Chief Financial Officer, prior to being issued by Back-office provider.

3.2 After approval by the Chief Financial Officer, a complete set of monthly financial statements shall, including the supplemental schedules described above, shall be distributed to the following individuals:

1. All members of the Finance and Audit Committee of the Board
2. Chief Executive Officer
3. School Principals and any other employee with budget-monitoring responsibilities will receive only the budget vs. actual report

3.3 Financial statements may include an additional supplemental schedule prepared or compiled by the Chief Financial Officer. The purpose of this schedule is to provide known explanations for material budget variances in accordance with MERF'S budget monitoring policies. Also included is a list which lists all invoices that have not been paid at the end of the year and all revenues, if any, that have not been received.

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4.1 ANNUAL FINANCIAL STATEMENTS

- 4.2** A formal presentation of MERF's annual financial statements shall be provided by the independent auditor to the full Board of Directors at MERF's annual meeting. This presentation will be preceded by a meeting with MERF's Finance and Audit Committee, at which the Finance and Audit Committee will vote to accept or reject the annual financial statements.

5.1 GOVERNMENT RETURNS

- 5.2** MERF must be aware of its tax and information return filing obligations and comply with all such requirements of the Federal government, California and local jurisdictions. Filing requirements of MERF include, but are not limited to, filing annual information returns with the Internal Revenue Service (IRS), California charitable solicitation reports, annual reports for corporations, property tax returns, income tax returns, information returns for retirement plans, annual reporting of compensation paid, and payroll withholding tax returns.

6.1 FILING OF RETURNS

- 6.2** It is the policy of MERF to become familiar with the obligations in each jurisdiction and to comply with all known filing requirements. The Chief Financial Officer shall be responsible for identifying all filing requirements and assuring that MERF is in compliance with all such requirements.
- 6.3** It is also the policy of MERF to file complete and accurate returns with all authorities. MERF shall make all efforts to avoid filing misleading, inaccurate or incomplete returns.
- 6.4** Reports and returns which may be required to be filed by MERF include, but are not limited to, the following returns:
1. **Form 990** - Annual information return of tax-exemption of MERF, filed with IRS. Form 990 for MERF is due on the **fifteenth day of November, annually.**
 2. **Form 990-T** – Annual tax return to report MERF'S unrelated trade or business activities (if any), filed with the IRS. Form 990-T is due on the **fifteenth day of November, annually.**
 3. **Form 199** – Exempt Organization Annual Information Statement or Return (California) – This form is due on the **fifteenth day of November, annually.**
 4. **Form 5500** - Annual return for MERF'S employee benefit plans. Form 5500 is due on the **fifteenth day of November, annually.**
 5. **Federal and State Payroll Returns** - Filed on a quarterly or annual basis.

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6. **Form RRF-1** – Registration/Renewal Fee Report to Attorney General of California. This form is due on the **fifteenth day of November, annually.**
 7. **SF-SAC** – The Office of Management and Budget requires all Form SF-SAC and Single Audit submissions to be submitted on the Federal Audit Clearinghouse (FAC) Internet Data Entry System. The due date is established by OMB Circular A-133.
 8. **Form 1099's** – See **PUR101 VENDOR SELECTION.**
- 6.5 MERF'S fiscal and tax year-end is June 30. All annual tax and information returns of MERF Form 990, Form 990-T are filed on the accrual basis of reporting.
- 6.6 Federal and all applicable California payroll tax returns are prepared by the Chief Financial Officer, in consultation with MERF'S independent auditor and the pension plan third-party administrator.
- 6.7 It is the policy of MERF to comply with all California payroll tax requirements by withholding and remitting payroll taxes to California for each MERF employee.
- 7.1 PUBLIC ACCESS TO INFORMATION RETURNS**
- 7.2 Under regulations that became effective in 1999, MERF is subject to Federal requirements to make the following forms "widely available" to all members of the general public:
1. The three most recent annual information returns (Form 990), and
 2. MERF'S original application for recognition of its tax-exempt status (Form 1023 or Form 1024), filed with IRS, and all accompanying schedules and attachments.
- 7.3 It is the policy of MERF to adhere to the following guidelines in order to comply with the preceding public disclosure requirements:
1. Anyone appearing in person at the offices of MERF during normal working hours making a request to inspect the forms will be granted access to a file copy of the forms. The Chief Financial Officer shall be responsible for maintaining this copy of each form and for making it available to all requesters.
 2. For all written requests for copies of forms received by MERF, the Organization shall require pre-payment of all copying and shipping charges. For requests for copies that are received without pre-payment, MERF will notify the requester of this policy via phone call or by letter within 7 days of receipt of the original request.

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3. The copying cost charged by MERF for providing copies of requested forms shall be \$1.00 for the first page copied and \$0.20 for each subsequent page. All copies shall be shipped to requesters via Priority Mail, thus, shipping charges will be a standard \$5.00 per shipment.
4. After payment is received by MERF, all requested copies should be shipped to requesters in accordance with applicable laws. Making of all copies and shipping within legal time period shall be the responsibility of the Finance Team.
5. For requests for copies made in person during normal business hours, copies shall be provided while the requester waits provided the request is for twenty-five (25) or less copied pages. Requests for copies in excess of 25 pages but less than 100 pages will be available the next business day. All requests in excess of 100 pages will be sent to the requestor in accordance with applicable laws.
6. MERF shall accept certified checks and money orders for requests for copies made in person. MERF shall accept certified checks and money orders or personal checks as payment for copies of forms requested in writing. Personal checks must clear the bank prior to the copies being made and delivered to the requestor.

8.1 UNRELATED BUSINESS ACTIVITIES

- 8.2 Identification and Classification of unrelated business activities must be separately identified.
- 8.3 It is the policy of MERF to properly identify and classify income-producing activities that are unrelated to MERF's tax-exempt purpose using the guidelines described in the Internal Revenue Code and underlying regulations. Such income accounts shall be segregated in separate accounts in the general ledger of MERF in order to facilitate tracking and accumulation of unrelated trade or business activities.
- 8.4 It is the policy of MERF to file IRS Form 990-T to report taxable income from unrelated trade or business activities. Form 990-T is not subject to any public access or disclosure requirements. Accordingly, it is the policy of MERF not to distribute copies of Form 990-T to anyone other than management and the Board of Directors of MERF.

Revision History:

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Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

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Accounting Policies, Procedures and Forms

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SOP # G&A118 Revision: 2
Office Effective Date: 2/11/21 Approved by: BOD

Prepared by: Central

Title: G&A118 BUDGETING

Policy: The School Site Principals with the support of Back-office provider are responsible for preparing, monitoring, and implementing the annual school site budget. The School Site Principal must have the school site budget approved by the Board of Directors no less than 60 days before the fiscal year. It is the School Site Principal's responsibility to work with the central office in order to acquire the necessary budgetary information to implement their program. The budget may be revised as needed.

An annual Organization-wide budget shall be prepared on the accrual basis of accounting and the budget shall be adopted by the Board of Directors. The budget may be revised as needed. It is the policy of the Organization to adopt a final annual operating budget at least 60 days before the beginning of MERF's fiscal year.

Purpose: A budget is a management commitment of a plan for present and future MERF activities that will ensure survival. It provides an opportunity to examine the composition and viability of MERF's programs and activities simultaneously in light of all available resources

Scope: This applies to all departments and chart of accounts of the Organization.

Responsibilities:

Principal is responsible for providing information to Back-office provider so that the back-office provider service provider can prepare the annual site budget and make revisions as needed.

The Finance Department is responsible for reviewing the school site and Organization-wide budgets and budget revisions.

Back-office provider is responsible for preparing monthly budget vs. actual comparison reports.

Background: Budgeting is an integral part of managing MERF in that it is concerned with the translation of MERF's goals and objectives into financial and human resource terms. A budget should be designed and prepared to direct the

most efficient and prudent use of the MERF's financial and human resources. A budget is a management commitment of a plan for present and future MERF activities that will ensure survival. It provides an opportunity to examine the composition and viability of MERF's programs and activities simultaneously in light of all available resources.

G&A118 Budgeting
Accounting Policies, Procedures and Forms

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Procedure:

1.0 PREPARATION AND ADOPTION

- 1.1 The school site budgets will be developed by the School Site Principals and Back-office provider., The Organization-wide budget will be prepared by the Chief Financial Officer with the support of Back-office provider. They will gather proposed budget information from all Finance teams and others with budgetary responsibilities and prepare the first draft of the budget. Budgets proposed and submitted by each department should be accompanied by a narrative explanation of the sources and uses of funds and explaining all material fluctuations in budgeted amounts from prior years.
- 1.2 After appropriate revisions and a compilation of all school site budgets by Back-office provider, a draft of the school site budgets and Organization-wide budget will be presented to the Chief Financial Officer for discussion, revision, and preliminary approval. The Chief Executive Officer is responsible for the final approval of all budgets.
- 1.3 The final budget is then submitted by the Chief Financial Officer to the Board of Directors for adoption. School Site Principals shall be present at the Board of Directors budget approval meeting.
- 1.4 It is the policy of MERF to adopt a final annual operating budget at least 60 days before the beginning of the MERF's fiscal year. In addition, the Finance Team must setup the new fiscal year accounts, to input the budget into the accounting system and establish appropriate accounting and reporting procedures (including any necessary modifications to the chart of accounts), to ensure proper classification of activities and comparison of budget versus actual once the new year commences.

2.1 MONITORING PERFORMANCE

- 2.2 MERF will monitor its financial performance by comparing and analyzing actual results with budgeted amounts. This function will be accomplished in conjunction with the monthly financial reporting process described earlier.
- 2.3 On a monthly basis, budget reports comparing actual year-to-date revenues and expenses with budgeted year-to-date amounts shall be produced by Back-office

provider and distributed to each respective School Principal by the 20th of the following month.

- 2.4 The financial reports will also be distributed, on a monthly basis, to the Board of Directors. The Chief Financial Officer and School Site Principal, with the

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support of Back-office provider, will be responsible for answering budget questions posed at the Board meetings.

- 2.5 The Chief Financial Officer will also institute an on-going monitoring plan to ensure the fiscal operations effectively implement all Federal and State requirements and to ensure the safeguarding of Federal and State funds and assets.

3.0 BUDGET MODIFICATION

3.1 After a budget has been approved by the Board of Directors and adopted by MERF, reclassifications of budgeted expense amounts may be made by Back-office provider, with approval from the Chief Financial Officer or his designee (Controller or Senior Financial Analyst).

3.2 Budget reclassifications of any amount are at the discretion of the Chief Financial Officer.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider process	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	
3	2/11/2021	Revision to clarify budget modifications	Serdar Orazov, CFO

G&A118 Budgeting
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SOP # G&A119 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A119 INSURANCE

Policy: It is the policy of the Organization to have an active risk management program that includes a comprehensive insurance package and to maintain adequate insurance against general liability, as well as coverage for buildings, contents, computers, fine arts, equipment, vehicles, machinery and other items of value.

Purpose: To have a comprehensive insurance package and to maintain adequate insurance against general liability, as well as coverage for buildings, contents, computers, fine arts, equipment, vehicles, machinery and other items of value.

Scope: This applies to all areas of risk management.

Responsibilities:

Chief Financial Officer is responsible for monitoring risk management and identifying areas of insurance need.

Background: Risk management and insurance enable the Organization to hedge against known and unknown potential losses.

Definition: Workers' Compensation and Employer's Liability

Contractors are required to comply with applicable Federal and California workers' compensation and occupational hazard and disease statutes. If occupational hazard and diseases are not compensated under those statutes, they shall be covered under the employer's liability insurance policy.

Fidelity Bond

For all personnel handling cash, preparing or signing checks, MERF shall obtain insurance that provides coverage in a blanket fidelity bond. The specific needs of MERF will determine the dollar limit of this coverage.

Comprehensive Liability

This type of coverage may include directors, officers and employee general liability insurance, buildings, contents, computers, fine arts, boilers and machinery.

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Student Accident Insurance

All children enrolled in any of MERF's funded programs must be insured for accidents and injury. The limit per child enrolled will be determined by local area experience rates and potential risk assessments.

Procedure:

1.1 COVERAGE GUIDELINES

- 1.2** As a guideline, MERF will arrange for the following types of insurance, as a minimum:

Type of Coverage

- Comprehensive Liability
- Automobiles for Employees,
- Volunteers or Escorts
- Employee dishonesty/bonding
- Fire and Water Damage
- Directors and Officers
- Theft
- Workers' Compensation
- Student Accident Insurance

- 1.3** The dollar limits are identified in the Insurance Booklet.

- 1.4** MERF shall maintain a file of all insurance policies in effect. This file shall include the following information, at a minimum:

1. Description (type of insurance)
2. Agent and insurance company, including all contact information
3. Coverage and deductibles
4. Premium amounts and frequency of payment
5. Policy effective dates
6. Date(s) premiums paid and check numbers

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

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SOP # G&A120 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: G&A120 SUPPLIES

Policy: It is the policy of the organization to maintain an internal control system over supplies to prevent theft, overstocking, understocking, spoilage and obsolescence.

Purpose: To physically safeguard organization assets and to maintain accurate financial reporting.

Scope: This applies to non-capitalized assets.

Responsibilities:

School Principal or designee is responsible for maintaining safeguards over cleaning and education supplies at each school.

Procedure:

1.1 SAFEGUARDS

1.2 Each Principal or designee is responsible for monitoring safeguards over assets at each school site. School will properly safeguard supplies inventory by keeping storage and locker facilities locked.

1.3 Cleaning/Maintenance Supplies. The Custodian at each site is responsible for custody of cleaning and repair and maintenance supplies.

1.4 Educational Supplies. The Administrative Assistant or designee is responsible for custody of educational supplies. Only the Administrative Assistant and the School Principal will have access to educational supplies.

1.5 Educational supplies will be controlled in part by forms documenting custody, i.e. textbooks issued to students and use of laptops.

2.1 MONITORING

2.2 School will establish optimum minimum and maximum stock levels for inventory.

2.3 Finance teams will maintain records detailing purchases of each significant inventory item for each fiscal year.

2.4 School Principal or designee will conduct a physical inventory of the supplies listed above on an annual basis. The completed inventory will then be submitted to

Accounting so it can be reconciled to the general ledger.

G&A120 Supplies
Accounting Policies, Procedures and Forms

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	

G&A120 Supplies

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SOP # G&A121 Revision: 2
Office Effective Date: 9/5/17

Prepared by: Central
Approved by: BOD

Title: G&A121 SCHOOL SITE ACCOUNTING

Policy: It is the policy of MERF to consider each school to be a separate and distinct financial accounting entity in order to maintain an accurate fund accounting system.

Purpose: The purpose of this policy is to clearly define relationships between each school and with the business office in regards to financial accounting.

Scope: This applies to the Organization's charter schools and business office.

Responsibilities:

Back-office provider, with the support of the Financial Analysts, is responsible for timely and accurate recording of transactions, providing useful management information, and properly reporting such information for various user needs.

The Chief Financial Officer is responsible for overseeing the Financial Analysts and providing assistance where needed.

Background: Separate accounting for each of the charter schools is critical in order to monitor budget performance and to determine how to allocate resources.

Procedure:

1.1 SEPARATE ACCOUNTING

1.2 Back-office provider will utilize the same accounting policies for each school they are responsible for. Consistency in accounting will ensure that the charter schools can be evaluated using the same benchmarks and will assist in evaluating performance.

1.3 Each Charter School will have its own accounting file to assist in maintaining separate accounting for each school, and a separate bank account to avoid comingling of funds.

2.1 FUNDRAISING

2.2 Fundraising generated from each school may not be transferred to another school.

2.3 Revenues from fundraising will be recorded in the accounting system using the resource tracking system in order to account for funds received from different events. Funds may be used for operating purposes unless restricted by the donor or explicitly restricted by the event.

Fundraiser Approval Process and Gift-Entry and Recording Policies

2.4 Fundraiser Approval Process: Each Magnolia Science Academy (MSA) teacher/staff member will submit a direct fundraiser request to the site principal.

The MSA site principal will thoroughly review the fundraiser request and either approve or deny a fundraiser request.

The head of development at the MPS Home Office under the office of the Outreach and Communication Department is informed to ensure there is alignment to the Magnolia Public Schools - Development Plan and Strategy.

If the fundraiser request does not align with the Development Plan and Strategy and/or the MPS mission and vision then a recommendation will be made to not proceed with the fundraiser to the site principal. If approved, and if the fundraiser will utilize the MPS website Stripe account, the head of the MPS development will create a “fund” specific to the fundraiser.

The MSA site fundraising lead will provide fundraiser details to the head of development to subsequently populate the fundraiser description section. If another approved donation payment app/s is utilized, then the MSA site fundraising lead will forward all donation details including fundraiser purpose, timeline, amount requested, amount received once the fundraiser has come to a close to the MPS finance and Development departments.

Payment apps offer convenience for business owners, contractors, and individuals who want to send money from person to person. Payment apps work by allowing you to make payments directly from your smartphone. You can make payments through your app without needing to have your credit card or debit card handy at all.

- Approved Apps: Stripe & Paypal

Magnolia Public Schools and Magnolia Science Academy website donation pages are operated by Stripe online payment processing. Funds are linked directly to each MSA’s account

- Donors Choose - Donors Choose is the most trusted classroom funding site for teachers.

Note, apps not listed need to be approved by the MPS Finance and Development departments prior to use by Magnolia Science Academy sites.

Gift-Entry and Recording Policy and Procedure

MSA sites will ensure all cash and checks are delivered to the MPS Finance department for accounting and depositing. An ACH transfer can be requested by the MPS Finance department throughout the duration of the fundraising campaign.

The Finance department will subsequently forward the MSA fundraising totals to the MPS Development department for recording in the Grants Management Portal. Periodically, the MPS Finance department will request a funds transfer from Stripe to prospective MSA accounts.

The Development department will add/update donor information in the MPS Grants Management portal, especially if the information on the check and/or response form is different.

The Development departments will record gifts according to the donor's intended use, i.e. unrestricted, restricted (specific program or project), endowment, etc.

The Development department will record in the system the source of the gift, i.e. direct-mail appeal, special event, personal solicitation, etc.

The Development department will prepare a quarterly report of gifts to be shared with appropriate staff and board committees for information and special acknowledgment.

The Development department will acknowledge all gifts within three to five business days using appropriate MPS thank-you letters based on the gift level.

G&A121 School Site Accounting

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider provider processes	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	
	4/7/22	Inclusion of Fundraiser Approval Process & Gift-Entry and Recording Policy	Steve Budhreja, CFO

SOP # G&A122 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: G&A122 FRAUD REPORTING &WHISTLEBLOWER

Policy: To establish procedures for reporting concerns of fraud on a confidential basis; receipt, retention, and treatment of complaints received by the Organization regarding such concerns; and protection of anyone reporting fraud in good faith from retaliatory actions.

Purpose: It is the policy of the Organization that its operations are conducted according to the highest standard of integrity, and that its officers, directors, employees, consultants, volunteers, interns, vendors, and other agents observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As employees and representatives of the Organization, all applicable laws and regulations must be followed, honesty and integrity must be practiced in fulfilling all responsibilities and all situations must be avoided that might conflict with responsibilities undertaken on behalf of the Organization. It is a federal crime for any organization – nonprofit or for-profit- to retaliate against a “whistleblower” who reports illegal, unacceptable, or suspicious activity (“Concerns”). This policy is intended to encourage and enable the reporting of Concerns within the Organization in order to prevent, detect and correct improper activities.

Scope: All officers, directors, employees, including temporary employees, consultants, volunteers, interns, vendors and other agents are covered by the scope of this policy and its guidelines.

Responsibilities:

Executive Management and Board of Directors are responsible for investigating any Concerns reported, and to ensure that the reporting person is protected from retaliation.

Background: The people closest to the day-to-day workings of an organization are the ones most qualified to identify and report improper activities. Experience has shown that these individuals will step forward if they are provided with a confidential means of reporting abuses and feel that they will be protected from retaliation, including loss of their job.

Procedure:**1.1 REPORTING RESPONSIBILITY**

- 1.2** It is the responsibility of all those noted in the Scope of the Policy to report questionable or improper accounting or auditing matters or other Concerns as described above.
- 1.3** No officer, director, employee, including a temporary employee, consultant, volunteer, intern, vendor or other agent who reports a Concern in good faith shall be subject to retaliation or, in the case of an employee, adverse employment consequences. Any individual who retaliates against someone who has reported a Concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment. Such conduct may also give rise to other actions, including civil lawsuits.
- 1.4** Reporting in good faith means that to the best of the individual's knowledge who is reporting a suspected fraud or abuse Concern, the fraud or abuse is factual.
- 1.5** An individual reporting a fraud or abuse Concern not in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment. In other words, fraudulently submitting a fraud or abuse Concern/allegation is not acceptable.

2.1 PROCEDURES FOR REPORTING CONCERNS

- 2.2 Employees and Consultants.** Whenever possible, an individual should seek to resolve Concerns by reporting issues directly to his supervisor. If, for any reason, the individual is uncomfortable speaking to his supervisor or does not believe the Concern is being properly addressed, the individual should report the Concern directly to the Chief Operating Officer of the Organization. If the individual does not believe that these channels of communication can or should be used to express his Concern, the individual should report the Concern directly to a member of the Organization's Board of Directors. Concerns may also be submitted anonymously in writing or via voice mail to a Board of Directors member. Contact information for the Chief Operating Officer and a listing of Board of Directors members may be obtained from the Organization's website or by calling the Organization at (714) 892-5066.
- 2.3 Officers, Directors, Interns, Volunteers, Vendors and Other Agents.** Officers, directors, interns, volunteers, vendors and other agents may report Concerns to the Chief Executive Officer or directly to a member of the Organization's Board of Directors. If the officer, director, intern, volunteer, vendor or other agent is uncomfortable reporting to any of these individuals, or if he does not believe the Concern is being properly addressed, the report should be escalated directly to the Chair of the Organization's Board of Directors.
- 2.4 Third Party Fraud Reporting Service.** An individual also has the option to report any Concerns through a service specifically set up for MERF. These can be

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reported through the website at www.magnoliapublicschools.org or by calling the central office. Concerns addressed through these channels can be made anonymously if the individual chooses.

3.1 HANDLING OF REPORTED CONCERNS

- 3.2 All reported Concerns filed in accordance with this policy will be investigated by the Organization with due care and promptness. Matters reported internally without initial resolution will be investigated by the Chief Executive Officer of the Organization to determine if the allegations are true, whether the issue is material and what actions, if any, are necessary to correct the problem. The Organization staff may issue a full report of all matters raised under this policy to the Board of Directors.

For matters reported directly to a member of the Board of Directors or the Chief Executive Officer, the Audit Committee shall promptly acknowledge receipt of the complaint to the complainant if the complainant is known. An investigation will be held to determine if the allegations are true, whether the issue is material and what corrective action, if any, is necessary. Upon the conclusion of this investigation, the Audit Committee shall promptly report its findings to the Executive Committee of the Board.

The Audit Committee shall have full authority to investigate Concerns raised in accordance with this policy and may retain outside legal counsel, accountants, private investigators, or any other resource that the committee reasonably believes is necessary to conduct a full and complete investigation of the allegations.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	

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SOP # G&A123 Revision: 0
Effective Date: 1/1/17

Prepared by: Central Office
Approved by: BOD

Title: G&A123 CONFLICT OF INTEREST POLICY

Purpose: It is the policy of the Organization that the Governing Board shall review and adopt a conflict of interest policy annually or as required in accordance with authorizer MOUs.

Responsibilities:

Executive Management and Board of Directors are responsible for ensuring that the conflict of interest policy is reviewed and approved annually each July.

Background: Refer to separate document titled "Conflict of Interest Policy".

Revision History:

Revision	Date	Description of changes	Requested By
0	7/21/16	Documented policy approved by Board as separate document	Caprice Young

SOP # G&A124 Revision: 0
Office
Effective Date: 3/08/18

Prepared by: Central
Approved by: BOD

Title: G&A 124 HOME OFFICE MANAGEMENT FEES

Policy: Charter school-related organizations (CSRO) may charge a charter school fees for the legitimate, contractually agreed upon services it provides to the charter school.

Purpose: To clearly define Home Office Management Fee calculations for all MPS school sites

Scope: This applies to all MPS schools of the organization.

Responsibilities:

Finance Team is responsible for review and confirmation of all monthly calculation and payments from school sites to MERF.

Back-office service provider is responsible for accurate bookkeeping and recording of all payments and outstanding fees.

Chief Executive Officer and Chief Financial Officer are responsible for approval all Home Office Management Fee transactions.

Procedures: Home Office Management Fees calculation is based on total allowable expenses allocated using a tiered methodology approved by the board, as follows:

School Names	ADA for Fiscal Year	Tier Factor	Subtract calculated with different fee structure	Factor with	Adjusted Tier Factor	
Magnolia Science Academy	#	1 .60			1 .60	
Magnolia Science Academy 2	#	1 .60			1 .60	
Magnolia Science Academy 3	#	1 .45			1 .45	
Magnolia Science Academy 4	#	0 .12			0 .12	
Magnolia Science Academy 5	#	0 .12			0 .12	not to exceed 15%
Magnolia Science Academy 6	#	0 .12			0 .12	
Magnolia Science Academy 7	#	0 .80			0 .80	
Magnolia Science Academy 8	#	1 .60			1 .60	
MSA- San Diego	#	1 .30		1.30	-	not to exceed 11%
MSA- Santa Ana	#	1 .60			1 .60	
TOTAL	###	10.31		1.30	9 .01	

The Home Office Management Fee for MSA 5 is not to exceed 15% of the school’s revenue, defined as the amount received in the current fiscal year from LCFF calculated pursuant to Section 42238.02, as implemented by Section 42238.03, per LACOE’s condition for authorization beginning fiscal year 2018-19. The Home Office Management Fee for MSA San Diego shall not exceed 11% of the total LCFF revenue based on the MOU with the current authorizer, SDUSD effective fiscal year 2015-16.

Revision	Date	Description of changes	Requested By
0	3/08/18	Initial Release	Nanie Montijo, CFO

SOP # CSH101 Revision: 2
Effective Date: 4/7/2022

Prepared by: Central Office
Approved by: BOD

Title: CSH101 CASH BOXES

Policy: Proper internal control should be maintained over funds received by cashiers or sales clerks of any type, even at fundraising events at all times.

Purpose: To identify the practices for cash box control, including cash receipts, special tender items, cash payouts and reconciliation with deposits.

Scope: All personnel that deal with the cash transactions.

Responsibilities:

Principal is responsible for safeguarding / verifying and controlling all cash assets at each school.

School Office Manager is responsible for ensuring the completeness and accuracy of all opening, closing and intermediate transactions.

School Office Manager is responsible for overseeing all event transactions.

Procedure:

1.1 CASH BOX/SAFE

1.2 Each fundraiser or individual collecting cash should collect cash for events and safeguard properly. Once all cash has been collected, this individual should submit the cash received to the School Office Manager as soon as possible for placement in the cash box. It is important to ensure that only one person has responsibility for collecting cash as to limit any opportunities for misappropriation.

1.3 All cash collected must be collected by the School Office Manager, counted together with the School Principal and one other person, and signed off by all three individuals that the cash count is accurate. The funds will then be safely secured until deposited by a designee of the School Office Manager.

1.4 If the cash balance at the end of day exceeds \$2,500, a bank deposit will need to be made the same day. Otherwise, all bank deposits will need to be made by the last business day of the week. At the end of the week there should be no more than \$100 left in the cash box for the following week.

1.5 Bank deposit documentation needs to be emailed to Back-office provider, in PDF format, for entry into the general ledger on a weekly basis.

CSH101 Cash Box
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office providerservice provider process	OswaldoDiaz, CFO
2	4/7/22	Revision to clarify processes and positions	Steve Budhreja, CFO



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SOP # CSH102 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: CSH102 CASH RECEIPTS AND DEPOSITS

Policy: Accurate internal control of cash receipts and deposits will be maintained at all times. Cash deposits will generally be made on the same day as receipt.

Purpose: To establish the procedures to be followed for receiving, applying and depositing cash receipts.

Scope: This procedure applies to all cash receipts received by the Organization.

Responsibilities:

Finance team is responsible for processing all cash and check transactions and depositing checks received in the bank.

Finance team is responsible for inspecting and verifying proper signatures or endorsements on checks.

School Principal/Office Manager is responsible for all fundraising transactions.

Definitions: Tender Item. Any item used to tender or pay for a transaction is considered a tender item. Tender items can include coupons, gift certificates, credits, rebates, cash, checks, barter credits, etc.

Procedure:

1.1 **CUSTOMER AND AGENCY DEPOSITS**

1.2 Cash receipts generally arise from:

- Contracts and Grants
- Direct donor contributions
- Fundraising activities

The principal steps in the cash receipts process are:

Central Office - The Receptionist receives incoming mail, opens, date stamps, and distributes the mail. The Finance team stamps all checks “for deposit only,” and makes one (1) copies of each check. The checks are kept in a locked cabinet until ready for deposit.

Weekly (or more often if necessary), the Finance team processes the following: the endorsed checks, the deposit log book, and the correct account allocation for each deposit. The Finance team processes the deposit and

takes it to the bank for deposit. A copy of the deposit slip is attached to the deposit. The deposits are put in a file to attach to the bank statement.

All cash received at the central office will be counted, verified, and signed off by two people from Accounting and another available staff member. The cash will immediately be posted using the appropriate allocation. A receipt will be given to the paying party and a copy kept for internal purposes. The cash will be kept in a locked, secure location and deposited within 24 business hours, but no longer than the last business day of the week.

School Site - The Receptionist receives incoming mail, opens, date stamps, and distributes the mail. The checks are kept in a locked cabinet until ready for deposit.

Weekly (or more often if necessary), the Principal, Office Manager, or designee will deposit the checks to the bank for deposit. The Principal, Office Manager, or designee will then send copies of the check(s) deposited and the original deposit slip receipt from the bank to the Finance team for processing.

The back office provider will process the deposit and enter into the accounting system. A copy of the deposit slip is attached to the deposit. The deposits are put in a file to attach to the bank statement.

2.1 APPLICATION OF ACCOUNTS RECEIVABLE

2.2 Inspect all incoming accounting mail for checks.

2.3 Finance team should photocopy all checks. Any papers attached to the checks should be stapled to the check photocopy and the envelopes discarded.

2.4 Finance team will use the photocopy of the checks and customer remittance advices to apply the cash payments to the Accounts Receivable Ledger if applicable. Unapplied payments are to be credited against the oldest open aging column on the accounts receivable ledger. A standard letter of information and/or inquiry should be sent or faxed to the payer when there is any question as to the correct application of the check.

2.5 Checks returned once should be deposited a second time. Already re-deposited checks should be debited back to the account.

2.6 Prepare all checks received for deposit.

3.1 DEPOSIT, ENDORSEMENT OF CHECKS, TIMELINES OF BANK DEPOSITS

3.2 The Finance team will inspect all checks for proper signature or endorsement. If a check is received without a proper signature then process the check as per CSH103 PROBLEM CHECKS procedure

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- 3.3** All checks should be endorsed as follows:
- a. With the restrictive endorsement "For Deposit Only" along with,
 - b. The Organization's designated bank deposit account number,
 - c. The name, "Magnolia Education and Research Foundation",
 - d. The bank name.
- 3.4** No check should be withheld from daily deposit unless it is legally imperfect. The endorsed checks should then be returned to the Finance Team. Bank deposits will be made on a daily basis, unless the total cash amount received for deposit is less than \$1,000. Receipts must be deposited no later than the Friday of the week it was received. Any cash not deposited on a daily basis will be kept in a locked fireproof cabinet with access limited to the Chief Financial Officer, and the Finance Manager.
- 3.5** At time of deposit, collect all cash and checks and prepare a bank deposit slip for deposit in the Organization's authorized bank. Ensure that collections are deposited into the correct bank account, and that the name of the charter school is listed on the deposit slip.
- 3.6** Place a duplicate copy of the deposit ticket and collected cash into a cash bag for transport to the bank. Deposits should be made no less frequently than daily if amount of cash exceeds \$1,000. If the deposit cannot be made immediately then the deposits should be stored in a secure area for later deposit.
- 3.7** Extreme care should be taken to protect the safety of the person making the deposit and the deposit itself. Actions to be considered are, making deposits only during daylight hours, using random deposit times and different routes to the bank, and assigning two people to make deposits.
- 3.8** The deposit amount should be entered into the accounting program.
- 3.9** No disbursements should be made from collections, nor can personal checks be cashed.

CSH102 Cash Receipts and Deposits
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	

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SOP # CSH103 Revision: 2
Office
Effective Date: 9/5/17

Prepared by: Central
Approved by: BOD

Title: CSH103 PROBLEM CHECKS

Problem: To save time in returning and following-up on unsigned, checks marked "payment in full", or returned by the bank. These checks should be processed as follows and deposited.

Purpose: To describe how these types of checks should be handled before depositing.

Scope: This procedure applies to all checks received by the Organization.

Responsibilities:

Back-office provider is responsible for processing all check transactions for each school.

Definitions: NSF. Non-Sufficient Funds or NSF checks are those that are returned from the bank because the balance in the checking account was not high enough to cover the check. The check is then stamped NSF or "insufficient funds", "uncollected funds", or maybe "account closed".

Procedure:

1.1 UNSIGNED CHECKS

1.2 The word "over" should be typed or written on the line where the signature would normally appear. On the back, type "Lack of Signature Guaranteed" and then add the Organization name, manager's name, title and signature.

Note: This indicates to the bank that the Organization will take back the check as a charge against its account in the event it isn't honored. In the event the check is not honored, the Office Manager should immediately follow-up with the issuer.

1.3 Continue processing the check.

2.1 PARTIAL PAYMENT CHECKS MARKED "PAYMENT IN FULL"

2.2 If there's no dispute as to the amount, a check tendered for less than the amount due and marked "payment in full" (or similar wording) can be cashed without jeopardizing the right to recover the balance. However, if there's a bona fide dispute as to the amount owing, the Organization runs the risk that payment will be deemed to have settled the disputed claim for the lesser amount.

- 2.3 To overcome any potential pitfall, the check should be endorsed with the following statement "Check is accepted without prejudice and with full reservation of all rights under section 1-207 of the UNIFORM COMMERCIAL CODE (see Reference A).

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- 2.4 Continue processing the check as per procedure CSH102 CASH RECEIPTS AND DEPOSITS.
- 2.5 The Office Manager should then work with the customer to resolve collection of the remaining balance due.

3.1 RETURNED CHECKS

- 3.2 A returned check for less than \$100 or stamped "uncollected funds," should be re-deposited the following day, if the check is not already stamped, "Do Not Re-Deposit".
- 3.3 For returned checks in amounts greater than \$100, the bank that the check is drawn against should be telephoned to determine if the check amount will clear the customer's account. If sufficient funds exist the check should be re-deposited. If the check is very large, consider taking the check directly to the issuing bank for recovery.

Note: The customer's account number should be the second number series located at the bottom center of the check.

4.1 REDEPOSITED CHECKS

- 4.2 In the event a re-deposited check is returned or if sufficient funds do not exist to cover the check, the Office Manager should contact the issuer by phone to report the problem and discuss how the matter will be resolved. Then issue a formal notice CSH103 Ex1 BAD CHECK NOTICE via certified mail with a return receipt requested to ensure the customer understands the seriousness of the issue.
- 4.3 Whenever a check is re-deposited more than once a handling fee should be considered.

References:

A. UNIFORM COMMERCIAL CODE (UCC)

The "Uniform Commercial Code" or UCC began as a model for each state legislature to modify and adopt as law in that state. Therefore, the UCC is not the same in every state. Each state's court system can interpret the UCC differently thereby creating different case law in that state and producing different results.

Business people cannot assume that the law will be exactly the same in each state. For more information see the Secretary of State for each State in question.

B. BAD CHECK LAW

Bad Checks are considered part of the UCC and therefore are a matter of state law enforcement. Section 3-104(2)(b) of the UCC, defines a check as "a draft drawn on a bank and payable on demand." Each state has a different "Bad Check Law" see UCC above.

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Postdated check: since it is not payable on demand, most states believe that the giving of a post-dated check does not constitute a present fraud nor is it within the scope of the bad check laws.

Payments for COD or pre-existing debt: In most cases, NSF checks are not considered under the bad check law if they are used to pay a note payment or to pay an invoice that is on account. However, if the debtor provides a creditor with a NSF check for a COD order, then that act does fall within the bad check laws.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of Backoffice	Oswaldo Diaz, Chief Financial Officer
2	9/5/17	Revision to clarify processes and positions	

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SOP # CSH104 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: CSH104 WIRE TRANSFERS

Policy: To provide additional payment options to customers and vendors in order to make funds immediately available to the receiving party. Wire transfers should be treated with special care and accuracy to prevent loss to the Organization or the customer.

Purpose: To explain the steps necessary to ensure proper procedures are followed when processing wire transfer requests.

Scope: This procedure applies to customers who are sending or receiving wire transfers and the financial institutions which process these requests.

Responsibilities:

Chief Financial Officer is responsible for initiating all outgoing wire transfer requests.

Chief Executive Officer or Chief Financial Officer should approve all wire transfers regardless of amount. Finance team is responsible for processing all incoming wire transfers.

Definitions: ABA The American Bankers Association or ABA number is a unique routing identification code is issued to a Federal or State chartered financial institution which is eligible to maintain an account at a US Federal Reserve Bank. The ABA Routing Number (a.k.a. ABA number; Routing Transit number) is used to identify participants in automated clearinghouses, electronic funds transfer, and on-line banking.

Procedure:

1.1 INCOMING WIRES

1.2 Wire transfers are processed the same as a check in accordance with the CSH102 CASH RECEIPTS AND DEPOSITS procedure.

1.3 Upon the banks receipt of the wire transfer the bank may create a wire transfer notification. Normally these are mailed but many banks may also provide notification via e-mail, phone, fax, or via an on-line banking interface. The bank notification serves as documentation the the money has been received.

2.1 OUTGOING WIRES

2.2 The Chief Financial Officer will initiate wire transfers as necessary. This will take place on the secured website maintained by the Organization's bank. Chief Executive

Officer must approve all wire transfers by logging into the bank's secured website and approving the transfer. Wire transfers cannot be made without this secondary authorization.

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- 2.3** Wire transfers should originate from a checking account. Reference A - FRB Reg D. - establishes limits on transfers from savings or money market accounts but there are no limits on transfers from checking accounts.

References:

A. FRB REG D: RESERVE REQUIREMENTS OF DEPOSITORY INSTITUTIONS

Defines consumer depository accounts (e.g., checking, savings, money market, CDs, transactions etc.) and the rules governing those accounts. This law also requires that financial institutions keep a minimum amount of reserve deposits either as vault cash or with the Federal Reserve.

The Federal Reserve Board's Regulation D limits the number of certain withdrawals and transfers from savings accounts. All financial institutions are subject to this regulation. Examples savings accounts affected by this regulation include: Regular Savings and Money Market accounts. Transactions on Checking accounts are not limited.

Regulation D, allows up to six (6) preauthorized or automatic withdrawals or transfers to another account at the same financial institutions or to a third party during a calendar month. There may be no more than three (3) of these six (6) transfers by check, debit card, or similar order, clearing an account. A "preauthorized transfer" includes arrangement the credit union make either to pay a third party, one time, on written or verbal instruction, or to pay a third party on a fixed schedule, (i.e. bill payer, ACH authorizations).

B. FRB REG E: ELECTRONIC FUND TRANSFER ACT

Establishes the rights, liabilities and responsibilities of all parties involved in electronic fund transfers and protects consumers when they use such systems. Examples of these transactions include those at automated teller machines, telephone bill-payment plans, point-of-sale purchases and pre-authorized transfers to and from a consumer's account (such as direct deposit and regular utility and mortgage payments).

Regulation E prescribes rules for the solicitation and issuance of EFT cards; governs consumers' liability for unauthorized electronic fund transfers (resulting, for example, from lost or stolen cards); requires institutions to disclose certain terms and conditions of EFT services; provides for documentation of electronic transfers (on periodic statements, for example)- sets up a resolution procedure for errors; and covers notice of crediting and stoppage of preauthorized payments from a customer's account.

Stored-value cards (also known as "smart cards") and home banking by personal computer would be subject to Regulation E because the act governs electronic fund transfers.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	
2	4/7/22	Add CFO as approver of wire transfer	Steve Budhraj, CFO

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CSH104 Wire Transfers

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SOP # CSH105 Revision: 0
Effective Date: 2/14/13

Prepared by: Central Office
Approved by: BOD

Title: CSH105 CHECK SIGNING AUTHORITY

Policy: MPS Board of Directors appoints and approves employees authorized to sign checks.

Purpose: To outline the check signing authority process.

Background: While a hired accountant, office manager, or accounting clerk may be responsible for entering bills, paying bills, and printing out checks, all printed checks and related documentation should be presented to a second individual for signing. No one person or employee should be allowed to enter invoices, select invoices for payment, then print and sign checks. At a minimum, this process requires at least two individuals to ensure the integrity of the accounting system remains intact.

Scope: This procedure applies to all regular bank checking accounts of the Organization.

Responsibilities:

Chief Executive Officer is responsible for adding and removing check signing authority. Any change made is subject to board approval.

Chief Financial Officer is responsible for managing the check signing authority process and alerting all individuals and banks of any changes to authority.

Procedure:

1.1 AUTHORIZED CHECK SIGNERS

1.2 The Board of Directors and the Chief Executive Officer should approve authorized check signers in writing. All approvals should be forwarded to the Chief Financial Officer for processing.

1.3 The Chief Executive Officer and Chief Financial Officer should have check signing authority.

1.4 For back-up purposes, it is advisable to have at least three check signers authorized for each checking account. One should be the Chief Financial Officer or primary signer and the other should be the Chief Executive Officer or secondary check signer. The third should be a back-up signer. The back-up signer should be a trusted individual but not necessarily an employee. It could be a board member or another principal in the Organization. A back-up signer will ensure continuing operations in case both the primary and secondary signers become incapacitated for

any period of time.

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Accounting Policies, Procedures and Forms

- 1.5** If the check signer also authorizes purchase orders, their access to the accounting system should be limited to “read” access as to maintain proper segregation of duties.

2.1 CHANGING CHECK SIGNERS

- 2.2** The Executive Assistant/Board Secretary receives all approval paperwork and should prepare and maintain a file record of all authorized check signers and CSH105 CHECK SIGNING AUTHORITY LOG.

- 2.3** The CHECK SIGNING AUTHORITY LOG should be kept current of all individuals and their status to sign checks as soon as their status changes. The log should contain the following information:

- Recipient name / position or title
- Authority start date
- Authority end date
- Maximum expenditure authority level

- 2.2** Contact the bank that administers the checking account for details on adding, changing, or removing check signers from a checking account. Normally this is a simple process of presenting identification and signing a card to be placed on file at the bank.

Banks maintain an authorized check signer’s card for each checking account. Only those individuals listed on the authorized check signer’s card may sign checks.

- 2.3** The Chief Executive Officer or the Board of Directors may revoke check signing authority. Any person who is no longer entitled to sign Organization checks will be notified in writing. The Chief Financial Officer will oversee the proper notification of the Organization's banks whenever authorized signature changes are made.

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Accounting Policies, Procedures and Forms

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/14/19	Authorized signer	Nanie Montijo, CFO

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Accounting Policies, Procedures and Forms

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SOP # CSH106 Revision: 1
Effective Date: 10/14/19

Prepared by: Central Office
Approved by: BOD

Title: CSH106 CHECK MATTERS

Policy: To ensure efficient processing and record keeping all check matters will need to be handled and documented appropriately.

Purpose: To describe the process for matters relating to checks.

Scope: All checks.

Responsibilities:

Chief Financial Officer or Finance team is responsible for managing other check matters.

Procedure:

1.1 CHECK ORIGINATION

1.2 The Organization permits the use of manual checks for payroll related payments after the board approved process is followed.

1.3 In no instance can the payee of a check be made to “Cash”.

2.1 CHECK STOP PAYMENT

2.2 It is important to place the stop payment information on the account as quickly as possible to prevent losses. The following information should be obtained and recorded on the bank’s Stop Payment Form or address online:

- Requester’s name and department
- Account number
- Check number
- Date of the check
- Who the check is made payable to
- Amount of the check
- Reason for the stop payment

2.3 The stop payment information above should be forwarded to the Finance team or Chief Financial Officer who will contact the bank to put a stop on the check.

2.4 An authorized check signer may need to sign the bank’s Stop Payment Form or address online, typically within ten business days. Normally, stop payments are placed on the account for approximately six months.

2.5 To release the stop payment, an authorized check signer may need to contact the bank and sign a release. Note: signing the release allows the check to be paid.

CSH106 Check Matters

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Accounting Policies, Procedures and Forms

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	
2	10/14/19	Revision to permit use of manual checks	Nanie Montijo, CFO

CSH106 Check Matters

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Accounting Policies, Procedures and Forms

SOP # CSH107 Revision: 1
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: CSH107 BANK ACCOUNT RECONCILIATIONS

Policy: To ensure the accuracy of the Organization's bank account records by proving the monthly balance shown in the bank's Account Register.

Purpose: To outline the practices for preparation of a Monthly Bank Reconciliation

Scope: This applies to all bank accounts maintained by the Organization.

Responsibilities:

Chief Financial Officer or designee is responsible for review and approval of all reconciliations.

Back-office service provider is responsible for reconciling each site's respective checking account.

Background: Errors or omissions can be made to the Organization's bank account records due to the many cash transactions that occur. Therefore, it is necessary to prove the monthly balance shown in the bank account register. Cash on deposit with a bank is not available for count and is therefore proved through the preparation of a reconciliation of the Organization's record of cash in the bank and the bank's record of the Organization's cash that is on deposit.

Procedure:

1.1 BANK STATEMENT PREPARATION

1.2 After receipt of the monthly bank statement and/or online printing of the monthly bank statement, back-office accountant should prepare the monthly bank reconciliation as follows:

- By the 15th of the following month for MSA 1, MSA 2, MSA 3 and MSA 5 and;
- By the 20th of the following month for MSA 4, MSA 6, MSA 7, MSA 8, MSA SA and MSA SD

After preparation, the back-office client manager will carefully review the bank reconciliation. Once reviewed, the bank reconciliations are sent to the Finance Team for final review ~~and approval~~. To preserve proper segregation of duties, no single employee, should perform both cash transaction functions and bank account reconciliations.

The list of outstanding checks for vendor and employee expense payments is reviewed on a monthly basis by the Accounts Payable staff. If the date on the check is more than 120 days old, the check is stale.

2.1 COMPUTERIZED FORMAT

2.2 In the computerized environment, the accounting system provides an automated bank reconciliation task. This task is generally selected once a month in conjunction with receiving the month end bank statement and/or online printout of the month end bank statement. Once selected, the screen shows a list of all items that have been posted to the cash account and that have not been cleared from the previous month's account reconciliation. The screen is usually divided into two segments: one half is a list of all checks and other charges reducing cash, and the other half is a list of all deposits and other items increasing cash. This screen would also have a field for entering the proper month end date and the balance at month end, per the bank.

2.3 After the account-reconciling task is successfully completed, a report is provided which shows the reconciliation process, including outstanding checks and deposits in transit.

Note: Once completed, the bank reconciliations and bank statements are filed electronically.

Accounting Policies, Procedures and Forms

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	
2	4/7/22	Update stale check policy to reflect 120 days	Steve Budhraj, CFO

CSH107 Bank Account Reconciliations

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SOP # CSH108 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: CSH108 INTER-ACCOUNT BANK TRANSFERS

Policy: To ensure the accuracy of the Organization's bank account records by providing documentation of bank transfers.

Purpose: To outline the practices for preparation of an inter-account bank transfer

Scope: This applies to all bank accounts maintained by the Organization.

Responsibilities:

Chief Executive Officer is responsible for review and approval of all inter-account bank transfers

Chief Financial Officer is responsible for performing all inter-account bank transfers.

Background: Errors or omissions can be made to the Organization's bank account records due to the many cash transactions that occur. Therefore, it is necessary to authorize all inter-account bank transfers.

Procedure:

1.1 INTER-ACCOUNT BANK TRANSFER

1.2 Back-office provider monitors the balances in the bank accounts to determine when there is a shortage or excess in the checking account. Back-office provider recommends to the Chief Financial Officer when a transfer should be made to maximize the potential for earning interest or when funds are needed for processing payroll or other transfer needed. The Chief Financial Officer will determine when to make a transfer and in what amount. After the transfer has been initiated by the Chief Financial Officer, the Chief Executive Officer must log into the online banking system in order to complete the bank transfer process. A copy of the transfer is given to Back-office provider.

CSH108 Inter-Account Bank Transfers

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Accounting Policies, Procedures and Forms

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, Chief Financial Officer
2	9/5/17	Revision to clarify processes and positions	

Accounting Policies, Procedures and Forms

SOP # CSH109 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: CSH109 JOURNAL ENTRIES AND RECLASSIFICATION ENTRIES

Policy: To ensure the accuracy of the Organization's books and records by proving documentation of journal entries and reclassification entries. All journal entries shall be authorized in writing by the Finance Manager initialing or signing the entries.

Purpose: To outline the practices for preparation of journal entries and reclassification entries.

Scope: This applies to all accounting transactions performed by the Organization.

Responsibilities:

The Chief Financial Officer is responsible for review and approval of all journal entries and reclassification entries.

Back-office provider is responsible for performing all journal entries and reclassification entries

Background: Journal entries can directly affect the presentation of financial statements. Therefore, it is necessary to authorize all journal and reclassification entries.

Procedure:

1.1 JOURNAL ENTRIES AND RECLASSIFICATION ENTRIES

1.2 The Chief Financial Officer the Financial Analysts and Back-office provider monitor the balances in the accounting records of the Organization.

All general ledger entries including audit adjusting entries, reclassification entries, or other such journal entries shall be supported by journal vouchers or other documentation, which shall include a reasonable explanation of each entry. Examples of such journal entries include:

1. Recording of noncash transactions
2. Corrections of posting errors
3. Non-recurring accruals of income and expenses

Certain journal entries, called recurring journal entries, occur in every accounting period. These entries may include, but are not limited to:

1. Depreciation of fixed assets
2. Amortization of prepaid expenses

CSH109 Journal and Reclassification Entries
Accounting Policies, Procedures and Forms

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3. Accruals of recurring expenses
4. Amortization of deferred revenue

Support for recurring journal entries shall be in the form of a schedule associated with the underlying asset or liability account or, in the case of short-term recurring journal entries or immaterial items, in the form of a journal voucher.

It is the policy of MERF that all journal entries not originating from subsidiary ledgers shall be authorized in writing by the Chief Financial Officer initialing or signing the entries.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Revision of responsibilities	Oswaldo Diaz, Chief Financial Officer
2	9/5/17	Revision to clarify processes and positions	

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SOP # CSH110 Revision: 1
Effective Date: 11/12/15

Prepared by: Central Office
Approved by: BOD

Title: CSH110 PETTY CASH PURCHASES

Policy: The Organization does not permit the use of petty cash.

Scope: This applies to all petty cash transactions.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Removal of petty cash use	Oswaldo Diaz, Chief Financial Officer

SOP # CSH111 Revision: 3
Office
Effective Date: 9/5/17

Prepared by: Central
Approved by: BOD

Title: CSH111 CREDIT CARDS AND DEBIT CARDS

Policy: It is the policy of the Organization to provide credit cards to authorized members of the Organization staff in the performance of their duties and responsibilities. The Organization does not permit the use of debit cards. The use of credit is the same as handling cash; every precaution must be taken to account for all funds, whether Federal, State or otherwise, and the most efficient and effective purchasing procedures as well as internal controls will be implemented to safeguard Organization funds.

Purpose: To be able to use credit cards in a controlled manner that allows for purchases such as travel and where a check and/or purchase order is not accepted.

Scope: This applies to transactions at the discretion of the School Principal, Chief Executive Officer and Chief Financial Officer.

Definitions: Batch. All of the day's credit card transactions are collected into a "batch" of transactions. The batch is closed, usually at the end of the day, and the result is submitted to the merchant processor as a single "batch".

Settlement. The processor clears the credit card transactions in the batch and the result is "settled" to the designated bank account. Settlement varies by Credit Card organization but usually occurs in 2-3 days after a batch is closed.

Processor. The processor is responsible for authorizing credit card transactions and settling each batch. The processor is also the Organization that one must interface with on all discrepancies or "chargebacks".

Chargebacks. A chargeback occurs when a customer (cardholder) disputes a charge that appears on their monthly credit card statement. If the dispute is unable to be resolved, then the transaction is charged back to the merchant. The processor charges the merchant and returns the cardholder's money.

Responsibilities:

School Principal is responsible for authorization of credit card transactions up to \$10,000 in accordance with the approved budget.

Chief External Officer, Regional Directors and Chief Financial Officer are responsible for authorization of credit card transactions up to \$10,000 and over, using documented approval, not to exceed the current limits established by procedure number PUR10 4 Accounts Payable and Cash Disbursements.

Chief Executive Officer is responsible for authorization of credit card transactions up

~~to \$50,000~~, **90,000** using documented approval, not to exceed the current limits established by procedure number PUR104 Accounts Payable and Cash Disbursements.

CSH111 Credit Cards and Debit Cards

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Accounts Payable Specialist and Back-office provider are responsible for recording the transactions in the accounting records and reconciling credit card receipts to the credit card statements in accordance with CSH107 Bank Reconciliations.

Background: On occasion, the Chief Executive Officer and other senior management may not be in the position to carry a lot of cash or may need to use a credit card for purposes of travel arrangements. Under these circumstances and as considered necessary by Organization management, credit card transactions are acceptable.

Procedure:

1.1 CREDIT CARDS

1.2 Issuance of Corporate Credit Cards

Corporate credit cards are issued to personnel who travel on Organization business or have a legitimate need to purchase goods and services, either in person or on-line or when a purchase order cannot be approved in time or a purchase order is not accepted by a vendor. These cardholders will be required to sign a statement (CSH111 Ex1 Use of Credit Cards and Debit Cards Certification) acknowledging that the card shall be used exclusively for legitimate Organization- related business purposes and that the cardholder agrees to take reasonable precautions to protect the card from loss or theft by storing it in a secure location. Upon approval from the credit card company, a card will be issued bearing the names of both the individual and the Organization.

Cardholders, while working with other Organization staff, must plan activities and travel requests with sufficient time in order to avoid the use of credit cards.

Cardholders abusing this privilege may have the card revoked if it is determined that sufficient time was available in order to request and receive approval for a purchase order.

When using the credit card for internet purchases, cardholders should ensure that the site utilizes industry recognized encryption transmission tools.

All corporate credit cards will be issued from the same vendor to enhance the purchasing power of the credit card and to provide for efficient on-going monitoring of all purchases made with the credit card(s).

1.3 Cardholder Responsibilities

Every month, each cardholder will be provided with a statement detailing the expenditures that were charged to his/her corporate credit card. The cardholders will submit all receipts

for purchases of goods and services to the Finance Department within seven (7) days attached to the debit/credit card monthly statement after making any purchase. All documents will be initialed by the cardholder. In any instance of a missing receipt, payment will be the responsibility of the cardholder.

CSH111 Credit Cards and Debit Cards

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Should the Accounts Payable Specialist identify any inadvertent personal or unauthorized uses of the card, the card statement as well as all backup documentation will be forwarded to the Chief Financial Officer, for review.

The Chief Financial Officer, will discuss with the cardholder any charges of concern and the card member will be required to reimburse the Organization immediately for any such inadvertent personal charges or unauthorized charges.

Excessive inadvertent personal charges will be grounds for revoking credit card privileges. Personal use of corporate credit cards is strictly prohibited. Any personal use will subject the employee to the Organization's disciplinary actions.

Any fraudulent or other unauthorized charges shall be immediately pointed out to the Chief Financial Officer, for further investigation with the credit card provider and at the discretion of the Chief Financial Officer may be required to be reimbursed by the individual cardholder who purchased the unauthorized transaction.

The Organization requires the following review and approval procedures:

- The cardholder will review the card statement to ensure only their own approved charges are listed on the statement. Any charges not made by the cardholder will be identified and discussed with the Accounts Payable Specialist.
- The Chief Financial Officer will approve credit card usage by the Principals, and the Chief Executive Officer will approve credit card usage by the Chief Financial Officer, and the Board of Directors Chairperson will approve credit card usage by the Chief Executive Officer.
- The Accounts Payable Specialist will review all charges on the card statement against all purchase documents submitted by the cardholder.
- The Chief Financial Officer, will review charges and supporting documentation prior to the monthly card statement being approved and included for payment.

Cardholders shall report the loss or theft of a corporate credit card immediately by notifying the credit card company (24 hours a day, seven days a week) as well as the Chief Financial Officer. In the event of theft of the card, a police report will be filed by the cardholder and a copy of the report will be maintained for insurance purposes.

1.4 Revocation of Corporate Credit Cards

Failure to comply with any of these policies associated with the use of the Organization's corporate credit cards shall be subject to possible revocation of credit card privileges. The Chief Financial Officer, with the approval of the Chief Executive Officer or Board Chairperson, shall determine whether credit cards are to be revoked.

SH111 Credit Cards and Debit Cards
Accounting Policies, Procedures and Forms

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1.5 On-going Monitoring of Corporate Credit Cards

The Organization will implement continuous on-going monitoring of the use of corporate credit cards to ensure only authorized expenditures are made with the credit cards. Credit card usage must follow the same criteria as all other purchases; i.e., allowable, reasonable, necessary, and allocable, where required.

In addition, the Board of Directors may, from time to time, authorize unannounced monitoring of the use of corporate credit cards.

Corporate credit cards will be assigned only to the Chief Executive Officer, Chief External Officer and Principals and all charges to that assigned card will be the responsibility of that employee. Employees authorizing the use of the credit card by other Organization employees, parents or friends, will be subject to disciplinary action.

1.6 Employee Personal Credit Cards

With prior approval from the Chief Executive Officer and/or Chief Financial Officer, the Organization employees may incur legitimate Organization business expenses utilizing their personal credit cards for such expenditures. The Organization shall reimburse employees according to Organization reimbursement policy (PUR106 Reimbursements).

2.1 DEBIT CARDS

2.2 Debit Card Policy

The organization does not permit the use of debit cards.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/13/15	Revision of credit and debit card limits and controls	Oswaldo Diaz, CFO

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2	7/21/16	Revision of credit card limits and controls	Oswaldo Diaz, CFO
3	9/5/17	Revision to clarify processes and positions	
4	12/10/2021	Revision of credit card limits and controls	Serdar Orazov, CFO
5	4/7/22	Revision of credit card limits and controls	Steve Budhreja, CFO

CSH111 Credit Cards and Debit Cards

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Accounting Policies, Procedures and Forms

**CSH111 Ex1 USE OF CREDIT CARDS AND DEBIT CARDS
CERTIFICATION**

Certification of receipt of the Organization Policy and Procedures on the “Use of Credit and Debit Cards”:

I, _____, hereby certify that I have received
(Print name of employee) (Position)
and understand the above-stated policy and procedures and I will comply with those procedures. Failure to comply with the procedures may subject me to disciplinary action as outlined in the Organization Human Resources Policies and Procedures Manual.

Signature of Employee

Date

Chief Executive Officer

Date

CSH111 Credit Cards and Debit Cards
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Accounting Policies, Procedures and Forms

SOP # CSH112 Revision: 2
Effective Date:9/5/2017

Prepared by: Central Office
Approved by: BOD

Title: CSH112 INTRA-ORGANIZATION RECEIVABLES AND PAYABLES (DUE TO/DUE FROM)

Policy: To ensure that intra-organization transactions between individual charter schools and the central office are processed correctly

Purpose: To outline the practices for intra-organization transactions between individual charter schools and the central office

Scope: This applies to all charter schools operated by the Organization.

Responsibilities:

Chief Financial Officer is responsible for performing the intra-organization transactions with approval from the Board of Directors.

The Finance Department is responsible for alerting Back-office provider regarding intra-organization transactions. Back-office provider is responsible for recording it into the accounting system, and ensuring accuracy of fiscal year-end balances.

Background: Charter schools are highly dependent on government funding to operate. Government cuts and funding deferrals can result in cash shortages for schools. Therefore the need arises to allocate resources from other schools to cover any shortfall. It is necessary to correctly record transactions between the charter schools and the central office in order to properly determine each school's receivable/liability.

Procedure:

1.1 INTRA-ORGANIZATION TRANSACTIONS

1.2 The Chief Financial Officer, with the support of the Finance Department and Back-office provider, monitors cash balances daily for the charter schools. When a charter school realizes a need for funds, the Chief Financial Officer will assess resource levels for the other schools as well as the central office. If the central office does not have sufficient funds to advance to the charter school requestor, at the discretion of the Chief Financial Officer, the Chief Financial Officer may transfer funds from a charter school with surplus funds into the central office. The Chief Financial Officer may then transfer funds to the charter school requestor from the central office. For policy regarding inter-account bank transfers, refer to **CSH108 INTER-ACCOUNT BANK TRANSFERS**.

1.3 At the end of the fiscal year, each school's receivable or payable account will be reconciled in accordance with **G&A105 PERIOD-END REVIEW & CLOSING**. Once balances are reconciled, an agreement is prepared at the end of the fiscal year between each school and the central office to document the amount owed and repayment terms.

CSH112 Intercompany Receivables and Payables (Due To/Due From)
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Revision of responsibilities	Oswaldo Diaz, CFO
2	9/5/2017	Revision to clarify processes and positions	
3	5/9/2019	Revision to use terminology consistent with FCMAT manual	N. Montijo, CFO

Accounting Policies, Procedures and Forms

SOP # CSH113 Revision: 2
Effective Date:9/5/17

Prepared by: Central Office
Approved by: BOD

Title: CSH113 FINANCIAL RESERVES

Policy: To ensure each charter school maintains a fund reserve in order to protect itself from unforeseen revenue shortfalls or unexpected expenditures.

Purpose: To describe responsibilities and monitoring procedures over each charter school's fund reserve

Scope: This applies to all charter schools operated by the Organization.

Responsibilities:

Back-office provider is responsible for day to day monitoring of charter school cash accounts and ensuring their accuracy.

Chief Financial Officer is responsible for oversight over charter school cash accounts as to ensure that required fund reserve amounts are met.

Background: California regulations state that the following reserve amounts must be maintained:

- Greater of 5% of prior year operational expenditures or \$55,000 for districts with 0-300 ADA
- Greater of 4% of prior year operational expenditures or \$55,000 for districts with 301-1,000 ADA

Procedure:

1.1 FUND RESERVE BALANCES

1.2 Back-office provider will monitor the cash balance for each charter school to ensure its accuracy and to be able to project future amounts. This will be accomplished through timely bank reconciliations and regular budget vs. actual comparisons. This process is critical to quickly detect any potential cash shortages so expenditures can be modified or more resources can be requested.

1.3 If the required fund reserve amount for a charter school cannot be met, the Chief Financial Officer with the support of Back-office provider will need to determine where cash can be derived from in order to restore the fund balance. This can come from central office funds or from another charter school with surplus funds. See CSH112 INTERCOMPANY RECEIVABLES AND PAYABLES (DUE TO/DUE FROM) for this procedure.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service processes	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

Accounting Policies, Procedures and Forms

SOP # PYR101 PAYROLL DESK PROCEDUR Prepared by: Central Office
Effective Date: 3/9/17 **Approved by: BOD**

Title: PYR 101 PAYROLL DESK PROCEDURE

Policy: To clearly define responsibilities and procedures in processing the organization's payroll and implementation of the online payroll system in accordance with the generally accepted accounting principles.

Purpose: To outline and list areas of responsibilities for each group involved in the payroll process.

Scope: This applies to all staff of the organization.

Responsibilities:

Human Resources is responsible for setup and maintenance of all employee profiles

School Principal is responsible for accurate and timely submission of each site's attendance, extra duties and assignments.

Finance Team is responsible for review, generation and approval of all payroll.

Back-office service provider is responsible for accurate bookkeeping and analysis of payroll expenses.

Background: Personnel Cost is usually 70-75% of the organization's total operating expenses. It is vital that the organization administers the payroll process efficiently and in compliance with education codes and requirements.

Procedure:

- **HUMAN RESOURCES**
 - Coordinates job postings and complete new hire paperwork, ensures accuracy and completeness of all new hire procedures and collection of paperwork prior to start of work
 - Processes termination info and informs Finance Team whenever final checks are needed
 - Monitors all credential and other expiration dates
 - Ensures accurate employee withholdings/deductions in 3rd party payroll system as agreed to by employee

- **EMPLOYEE**
 - Signs in and out of automated system each day
 - Completes employee profile in online payroll system, which generates deductions and provides required information to HR

- **PRINCIPAL/SUPERVISOR**
 - Reviews/approves time and attendance reports and submits to Finance Team to initiate payroll processing
 - Enters all supplemental pay in payroll system on or before designated cutoff date
 - Submits signed schedule of all approved supplemental pay (i.e. stipends, home visits, Saturday School extra duty) to Finance Team each pay period
 - Notifies HR of any new hires, terminations, status or pay changes

- **FINANCE TEAM**
 - Confirms approvals from principals/HR prior to generating payroll
 - Runs payroll and generates reports for review
 - Reviews each payroll register, verifying:
 - Proper pay rate
 - Hourly staff – number of hours per pay period look reasonable
 - Extra pay/stipends are documented, approved and accurate as to amount and funding source
 - Employee retirement deductions are accurate and reasonable
 - STRS members have earnings properly treated in paycheck and correct STRS rates are being used
 - No OASDI withheld for any STRS members
 - Classified staff – PERS members have proper withholdings and OASDI deducted and correct PERS rates are being used

PYR 101 PAYROLL DESK PROCEDURES

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Accounting Policies, Procedures and Forms

- Only PERS or STRS creditable earnings are included in deduction calculations
- Non-PERS classified staff hours are being tracked and any newly eligible PERS members (>1000 hours in a fiscal year) are added as PERS members
- Process payroll, prints registers and files all supporting documentation including but not limited to: STRS/PERS contributions, Other Retirement Contributions, Payroll Tax Reports, Health and Welfare deductions and contributions to service providers
- Processes final paychecks and coordinates with back-office provider for delivery of checks if not processed in-house
- **BACK OFFICE**
 - Process ECR for final paychecks if not processed in-house
 - Uploads journal entries to record payroll in general ledger each pay period
 - Performs analytical procedures on payroll expenses as part of month-end close process

Revision History:

Revision	Date	Description of changes	Requested By
0	3/09/17	Initial Release	Nanie Montijo, CFO

PYR 101 PAYROLL DESK PROCEDURES

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Accounting Policies, Procedures and Forms

SOP # PYR 102 Revision:
Effective Date: 1/17/19

Prepared by: Central Office
Approved by: BOD

Title: PYR 102 TIME KEEPING PROCEDURE FOR FEDERALLY FUNDED EMPLOYEES

Policy:

To clearly define responsibilities and timekeeping procedures in tracking specific program cost information.

Purpose:

To outline and document timekeeping of a grant, award or program costs MPS uses to track expenditure information to ensure it spends a specific amount for a specific purpose.

Scope:

This applies to all staff paid with federal funds.

Responsibilities:

Human Resources is responsible for setup and maintenance of all employee profiles on Paycom.

School Principal is responsible for accurate and timely submission of each site's attendance, extra duties and assignments.

Finance Team is responsible for review, generation and approval of all payroll; in addition to maintaining and keeping records of all federally funded employees.

Back-office service provider is responsible for accurate bookkeeping and financial reporting.

Accounting Policies, Procedures and Forms

Procedure:

Employee Compensation - All amounts paid to an employee for services rendered during the award period. Compensation includes salaries, fringe benefits, stipends, bonuses and payments made under supplemental contracts.

Multiple Cost Objectives Employees - Employees who work on multiple cost objectives such as:

- More than one Federal award;
- A Federal award and a non-Federal award;
- More than one activity within a federal award that is separately tracked by MPS (such as set-asides, earmarks or match/in-kind contributions).

Personnel Activity Report (PAR) - A document certifying the amount of time a multiple cost objective employee spends on each cost objective. The PAR must reflect an after-the- fact distribution of the activities performed; account for the total activity for which the employee is compensated; be prepared bi-weekly and coincide with one or more pay periods; and be signed by the employee.

Semi-Annual Certification - A document certifying a *single cost objective* employee worked solely on *one cost objective*. The certification must be prepared at least every six months and must be signed by the supervisory official having first-hand knowledge of the work performed by the employee.

Periodic Certification

An employee who works in multiple cost objectives on a set schedule (predetermined). The periodic certification must be prepared at least semiannually and cover the entire period of the certification and must signed by the supervisory official.

All employees paid with federal funds must adhere to the following procedures to complete the appropriate time and effort records.

Determining Cost Objectives -

A cost objective is defined as a federal grant award, or other category of costs MPS uses to track specific cost information. In certain circumstances MPS may track the time employees spend on particular activities *within* a single federal grant in order to demonstrate compliance with federal requirements such as earmarks, set-asides or match/in-kind contributions. When MPS uses employee compensation costs to meet these requirements they are known as —cost objectives. In such a circumstance, an individual grant program may have more than one cost objective.

Determining cost objectives requires a careful reading of the programmatic provisions in the statute providing the funds. Employees should contact the Principal if assistance is needed in determining the cost objectives on which they work.

Accounting Policies, Procedures and Form

Single Cost Objective Employees -

An employee who works on a single cost objective must complete a semi-annual certification that indicates the employee worked solely on that cost objective for the period covered by the certification. The certification must be collected and reviewed at least every six months by the Principal, or his/her designee. Either the employee or a supervisor with first-hand knowledge of the work performed by the employee must sign the semi-annual certification.

A semi-annual certification must:

- ▪Be executed after the work has been completed;
- ▪State that the employee worked solely on activities related to a particular cost objective;
- ▪Identify the cost objective;
- ▪Specify the reporting period;
- ▪Be signed by the employee or a supervisor with first-hand knowledge of the work performed; and dated.

The supervisory official for all single cost objective employees must complete the semi-annual certification attached to these procedures.

If an employee works on a short-term cost objective whose end date does not coincide with the normal December/June collection dates for semi-annual certifications (e.g. a supplemental contract for summer school programs), the employee must obtain a semi-annual certification from the Supervisor after the time period for the work has ended.

All supervisory officials of single cost objective employees with first-hand knowledge of the work performed by the employee must complete and sign the semi-annual certification provided by the Supervisor

Executed semi-annual certifications must be forwarded to the Finance Department

Multiple Cost Objective –

Employees working on multiple cost objectives must maintain Personnel Activity Reports (PARs) or The Periodic Certification If they have a predetermined schedule. The report indicates the amount of time spent on each cost objective for the period covered by the PAR or equivalent documentation. The PAR must be prepared at least monthly, Periodic Certification must prepared at least semiannually. The employee must sign the PAR or equivalent documentation. An employee time card can be used in place of a PAR. Timecards will be documented and maintained by the MPS payroll department.

A PAR or equivalent documentation must:

- Be executed after the work has been completed (projections of how an employee is expected to work or position descriptions are not sufficient);
- Account for the total activity for which each employee is compensated, including

Accounting Policies, Procedures and Forms

part- time schedules or overtime (total activity means all of the time an employee works, not just the amount of time worked on a federal program);

- Identify the cost objectives;
- Specify the reporting period;
- Be signed by the employee (unlike a semi-annual certification a supervisor's signature alone is not sufficient); and
- Be dated after the fact (when the work has been completed).

At the beginning of each year, Finance Department will distribute blank PARs or Periodic Certification forms to the Principals that are required to complete on a bi-weekly basis throughout the year.

Copies of executed PARs, or approved equivalent documentation, must be forwarded to Finance Department every 2 weeks, Periodic Certification must be forwarded after the time period of work has ended.

Supplemental Contracts –

As discussed above, time and effort records must account for all of an employee's activities (i.e. 100% of an employee's time). Thus, if an employee works overtime that time must be reflected in the employee's time and effort record. If, however, an employee works in two distinct positions the employee may maintain separate time and effort records for each position.

For example, an employee works as a Title I teacher during the school day (charged to Title I) and a sports coach after school (charged to state or local funds). Assuming the coaching responsibilities are not part of the employee's regular job functions (e.g. the employee has a supplemental contract for the coaching position), the employee may treat each position separately – meaning the employee may complete a semi-annual certification for the teaching position, while no federal time and effort record would be required for the coaching position. In a similar example, an employee works as a Title I teacher during the school day (charged to Title I) and an after-school federally funded teacher. Assuming the after school activities are not part of the employee's regular job functions, the employee may complete a semi-annual certification for Title I teaching position and a separate semi-annual certification for the other supplemental federal program.

Stipends –

Employees may be provided stipends to participate in activities such as professional development. Employees receiving such stipends for MPS sponsored activities may satisfy time and effort records by signing the sign-in and sign-out sheets provided at the activity.

Reconciliation –

It is MPS's practice to charge employee compensation costs to federal programs based on

budget estimates that reasonably approximate how an employee will work during the year. The MPS back office service provider will reconcile payroll charges to the time and effort reflected in employee time and effort records at least quarterly. If any MPS staff or back office service provider staff identifies a variance between how an employee’s salary was charged and how the employee actually worked, MPS Finance staff will review and adjust its payroll charges so that the amount charged to federal funds reflects the employee’s actual time and effort. MPS will perform the reconciliation quarterly.

In-Kind Contributions and Matching –

Employees who are paid with non-federal funds that will be used to meet a federal match requirement (also known as in-kind contributions) must comply with the same time and effort reporting requirements as employees who are paid with federal funds. In other words, employees paid with matching funds who work on a single cost objective must complete a semi-annual certification in accordance with the procedures in section b. Employees paid with matching funds who work on multiple cost objectives must complete a personnel activity report in accordance with the procedures in section c.

Document Retention –

Time and effort records must be maintained for a period of five (5) years.

TRAINING

MPS will provide training on this procedure to all staff involved in federal programs such as:

- Distribution of federal laws, regulations and guidance
- Distribution of MPS policies and procedures
- Developing templates, checklists and other guidance documents as appropriate
- Internal training sessions
- Routine staff meetings and
- Informal technical assistance

Accounting Policies, Procedures and Forms Revision History:

Revision	Date	Description of changes	Requested By
0	1/17/19	Initial Release	Nanie Montijo, CFO

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SOP # INV101 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: INV101 FIXED ASSET CONTROL AND LEASES

Policy: Proper control procedures will be followed for all capital asset acquisitions, transfers and dispositions in order to provide internal control of capital equipment and to assist in reporting.

Purpose: To outline the procedures for acquiring, disposing and maintaining control of capital assets. This is particularly important for assets purchased with grant program dollars where the grantee may want the equipment returned at the end of the program.

Scope: This procedure applies to all equipment with a value of \$500 or more and furniture a value of \$5,000 or more.

Responsibilities:

School Principals are responsible and accountable for furniture, equipment, machinery and any other assets in their schools. An automated fixed asset tracking system will be implemented for tracking and tagging assets to be inventoried.

Definitions:

Capitalized Equipment: All furniture and equipment **individually** costing \$5,000 or more each should be recorded in the fixed assets inventory system and depreciated annually.

If purchased in bulk over the \$5,000 threshold, these items may also be deemed capitalized. For capital assets that are acquired as a "group purchase" whose individual acquisition cost is less than the \$5,000 threshold, it will be capitalized if the aggregate amount is \$5,000 or above. A "group purchase" is defined as an acquisition of 5 or more units of the same, identical item being made using a single requisition. In addition, the purchase of the assets serves a specific location or objective. For example, a decision is made to upgrade a computer lab. This will require 10 new computers located in a single area. Individually the computers cost \$1,000; however, the aggregate cost of the 10 computers will be \$10,000. The purchase is capitalized as a group purchase.

Non-Capitalized Equipment: No equipment costing less than \$5,000 each should be depreciated. However, non-capitalized equipment that is motorized, electronic, or computerized should be added to the fixed assets inventory system for fiduciary purposes only so that its existence can be verified during the annual physical inventory process.

Furniture: No furniture items costing less than \$5,000 each should be added to the fixed assets inventory system or depreciated

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Procedure:

1.1 ACQUISITIONS

- 1.2 All purchases of furniture and equipment as defined above must be tagged and included in the inventory listing.

See PUR102 for the procurement process to be followed.

- 1.3 Any internally constructed or donated equipment will be reported to the Finance Team if the item cost has a value of \$5,000 or more. A complete description of the property, date manufactured or received, number of items, cost or estimated value and a statement that it was internally constructed or donated will be included in the report.
- 1.4 To maintain proper segregation and control upon termination of any employees, any employee owned tools, equipment or furniture brought on the Organization premises will be reported to the School Principal. The report should include the employee's name, description of items, identification numbers, if any, and reason for using the asset.

2.1 DISPOSITIONS

- 2.2 Assets may be sold or traded-in on new equipment. An example INV103 Ex1 ASSET DISPOSITION form or updating of Excel workbooks is to be completed and approved by the School Principal. Any assets with an original value greater than ~~\$5,000~~ 10,000 will also require the Chief Financial Officer's approval.

Upon approval, the school may advertise the property for sale or submit a list to purchasing for sale and disposition. After completion of the sale, an example INV103 Ex2 BILL OF SALE provided below will be issued and the ASSET DISPOSITION form will be submitted to Finance Team who will ensure deletion of the item from the asset records and submit paperwork to back-office provider to record any gain or loss on the disposition.

- 2.3 Worn-out or obsolete property with no cash value will be reported to the Finance Team on the Asset Disposition form with the description, serial number and condition. The Finance Team will inspect all worn-out of obsolete property before it is removed from the school and discarded. The asset will then be removed from the asset records.
- 2.4 Any asset that is missing or has been stolen will be reported in writing to the School Principal and Finance Team as soon as possible. The description, serial number, and other information about the lost item should be included in the report.

Accounting will determine the proper course of action and will notify the company's insurance carrier and any outside authorities if deemed appropriate. If un-recovered, the asset will then be removed from the asset records.

- 2.5 Inter-school transfers of assets will be reported to Accounting in writing including the description, serial number and the name of the school to receive the property.

The School Principal to whom the item was assigned originally will be held accountable until accounting is notified of the transfer. After being notified, the School Principal acquiring the property assumes responsibility. Accounting will then record the inter- school transfer on the asset records.

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3.1 ASSET RECORDS

- 3.2** Upon any asset acquisition, Accounting is responsible for assigning and attaching asset number tags to the property where it can be readily located.

Accounting will then maintain a detailed listing of each fixed asset item which will include the description, date acquired, vendor, cost basis, assigned school and location. On an annual basis, accounting will furnish each school a report showing a listing of assets assigned to that school and any acquisitions, disposals and transfers during the past year. Any discrepancies must be communicated to the Finance Team by June 30th of each year . This report should be filed by the School Principal for reference and later use.

- 3.3** A physical count will be taken at each site every two years or as needed.
- 3.4** Each school will be responsible for locating assets with its number tag attached that are recorded as assigned to their school whenever requested by Accounting, a county property tax auditor or the company's external auditors.
- 3.5** Whenever a change in School Principal occurs, all items should be accounted for by the outgoing School Principal. The incoming School Principal will accept the responsibility and accountability for the school asset listing upon assuming the position. Accounting can assist with this audit if requested.

4.1 LEASED OR OWNED VEHICLES

- 4.2** The safety and comfort of MERF employees, parents and Board members is of utmost importance. Therefore, MERF has established a policy whereby vehicles, whether leased or purchased, will be retained for a maximum of 100,000 miles or 8 years, whichever is less. The Finance Team will establish a mileage log to ensure vehicles are properly planned and replaced on schedule. Any individual that is assigned a vehicle shall be responsible for maintaining the mileage log and working with the Finance Team in complying with the replacement requirements of this policy.
- 4.3** A mileage log will be retained for each vehicle and all users will note the beginning and ending mileage for all trips. This log will be provided to the designated driver upon pickup of keys for use of a vehicle. Under no circumstances may an employee retain the keys or mileage log overnight unless on an authorized, extended trip requiring overnight accommodations. All keys will be returned to the administrative office or central kitchen upon completion of the day's authorized trips.
- 4.4** The Finance Team will ensure that all vehicles are taken to an authorized vendor for maintenance and service. All vehicles will receive appropriate oil changes on a minimum 5,000 mile schedule. Tires will be rotated at the same time and tires will be replaced after 50,000 miles (or sooner) if believed to be worn beyond prudent safety levels.

- 4.5** The Finance Team will submit RFPs to authorized vehicle dealers and service vendors on an annual basis. All vehicles will be serviced by the same designated vendor(s) for this annual contract period. The only exception will be for vehicles, newly purchased or leased, which provide for free maintenance and service as part of its warranty period or any special arrangements made as part of the purchase or lease of the vehicle.

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- 4.6** Designated drivers must report any problems or issues identified, upon completion of their daily trip(s), to the Finance Team. A “Vehicle Report” must be completed and submitted to the Finance Team immediately upon return from any trip whereby a problem or issue is suspected or identified.
- 4.7** If any driver is involved in an accident, whether with another vehicle or not, the driver must complete an Accident Report form and submit the report form to the Finance Team immediately upon return to MERF. A copy of the report form and instructions for submitting the report and “what to do if involved in an accident” are included in the Exhibits section.

5.1 LEASES

5.2 Classification of Leases

It is the policy of MERF to classify all leases in which MERF is a lessee as either capital or operating leases. MERF shall utilize the criteria described in Statements of Financial Accounting Standards No. 13 in determining whether a lease is capital or operating in nature. Under those criteria, a lease shall be treated as a capital lease if, at the time of entering into the lease, any of the following factors are present:

1. The lease transfers ownership to MERF at the end of the lease term;
2. The lease contains a bargain purchase option;
3. The lease term is equal to 75% or more of the estimated economic life of the leased property; or
4. The present value of the minimum lease payments is 90% or more of the fair value of the leased property (using, as the interest rate, the lesser of MERF’s incremental borrowing rate or, if known, the lessor's implicit rate).

All leases that do not possess any of the four preceding characteristics shall be treated as operating leases. In addition, all leases that are immaterial in nature shall be accounted for as operating leases.

MERF shall also maintain a control list of all operating and capital leases. This list shall include all relevant lease terms.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/14/17	Revise to clarify process	
2	9/5/17	Revision to clarify processes and positions	
3	4/7/22	Update policies to align with industry standards	Steve Budhreja, CFO

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INV103 Ex1 ASSET DISPOSITION FORM

Date: _____ Requested By: _____ School

Reasons for Disposition: _____

Description	Serial Number	Date Purchased	Original Cost	Net Book Value	Expected Or Actual Proceeds	Gain or Loss

Principal: _____ Date: _____ Chief

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SOP # INV102 Revision: 1
Effective Date: 11/12/15

Prepared by: Central Office
Approved by: BOD

Title: INV102 FIXED ASSET CAPITALIZATION & DEPRECIATION

Policy: Asset acquisitions with a useful life expectancy of greater than one year and with a minimum threshold amount as specified by the Chief Financial Officer should be capitalized by the Organization and depreciated.

Purpose: The purpose of this procedure is to delineate the capitalization and depreciation methods for various asset groups.

Scope: All acquisitions of capital assets for the Organization.

Definitions: Capitalization - Capitalization is the method chosen to record the purchase of a fixed asset on the Organization's accounting books. If an asset is capitalized then it is not expensed in the same year the asset is purchased. Instead the asset is generally recorded on the balance sheet and individually on an asset schedule. Examples of capital expenditures are purchases of land, buildings, machinery, office equipment, leasehold improvements and vehicles. The asset is expensed each year as depreciation.

Depreciation - is an annual income tax deduction that allows the write-down or write-off of the cost of the asset over its estimated useful life to recover the cost or other basis of certain property over the time the property is used. It is an allowance expense for the wear and tear, age, deterioration, or obsolescence of the property.

As an asset ages and is used by the Organization, its value declines. It, in effect, becomes worth less and less over time. The declining value or usefulness of the asset over time is represented as a discount that is applied to the original purchase price. At the end of the asset's depreciation period, (and/or useful life), its value on the balance sheet will be zero, or fully-

depreciated. At the same time, the individual depreciation expenses will have all been recorded on the income statement.

Note: Land is not depreciated because land does not wear out, become obsolete, or get used up. But, the building on the land is depreciated. Land is generally viewed as an appreciating asset while all other capital assets are generally viewed as depreciating over time, with use. But, unlike depreciation, an asset's appreciation is not recorded on the books until the asset is sold, which is when the assets appreciation is realized.

Cost basis – The total amount paid for the asset, in cash or kind, is considered the “cost-basis”. This should include all charges relating to the purchase, such as the purchase price, freight charges and installation, if applicable. The cost basis is not the market value or list price of the

asset. It is the total amount invested in the purchase or the total amount paid.

Procedure:

1.1 CAPITALIZATION

- 1.2** All assets with a useful life of greater than one year and costing more than \$5,000 will be capitalized and (except for land) will be recorded in the depreciation records.

Bulk computer, software, and other technology purchases with an aggregate value of \$5,000 or more are captured as capitalized fixed assets regardless of individual price of item.

In addition, remodeling modifications and replacement costs of integral structural components are only capitalized when such costs incurred exceed \$50,000.

Depreciation or amortization is computed on the straight-line basis over the useful lives of the assets.

Any asset that does not meet the above criteria will be expensed such as small tools and equipment or repairs and maintenance.

- 1.3** The cost basis of furniture and equipment assets will include all charges relating to the purchase of the asset including the purchase price, freight charges and installation if applicable.
- 1.4** Leasehold improvements including painting are to be capitalized if they relate to the occupancy of a new office or a major renovation of an existing office or site. Expenditures incurred in connection with maintaining an existing facility in good working order should be expensed as a repair.
- 1.5** The cost of buildings should include all expenditures related directly to its acquisition or construction. This cost includes materials, labor and overhead incurred during construction, and fees, such as attorney's and architect's and building permits.
- 1.6** Maintain proper files on the details to all acquisitions, expenditures, and

maintenance performed on all assets. These records are vital for proper tax preparation and are used during yearly tax reporting and planning.

2.1 DEPRECIATION

2.2 The depreciation methods/lives for assets must be selected at the time the asset is first placed into service in order to ensure consistent financial reporting and tax compliance.

The Organization uses the straight-line method of depreciation.

The following represents a sample of the useful lives that the Organization may use for financial reporting purposes:

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2.3

2.4 The lowest life permitted by tax regulations for asset classes should be selected to optimize depreciation deductions.

2.5 Regardless of the depreciation rate required an Organization can elect to use a different method for financial statement purposes. Such method should be justified based on the expected useful life of the asset.

2.6 Depreciation will be recorded in the accounting system at the end of the fiscal year.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Revision of capitalization policy relating to technology aggregate purchases	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

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& Depreciation

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SOP # IVT101 Revisions: 0

Effective Date: 6/14/17

Prepared by: Central
Office Approved by:
BOD

Title: IVT101 INVESTMENTS

Policy: This policy establishes procedures to govern the investment of funds held by Magnolia Public Schools (“MPS” or the “Charter School”). This policy is based upon federal, state and local laws and regulations, and prudent money practices. To the extent that this policy conflicts with state or federal law, the applicable law shall prevail.

Purpose: MPS’ primary investment objective shall be to maintain the safety and liquidity of its funds. Safety of principal is the foremost objective of MPS. The primary objectives of MPS investment activities shall be, in order of priority:

1. **Safety.** The safety of principal is the foremost objective of MPS’s investment program. MPS’s investments shall be undertaken in a manner that shall preserve MPS’s capital.
2. **Liquidity.** MPS’s secondary objective shall be to meet its liquidity needs. The investment portfolio shall maintain sufficient liquidity to enable MPS to meet necessary cash flow and operating requirements which might be reasonably anticipated.
3. **Yield.** The investment portfolio shall be designed with the objective of attaining a market rate of return over the course of budgetary and economic cycles, taking into account the investment risk, constraints and the cash flow characteristics of the portfolio.
4. **Maintaining the Public’s Trust.** The investment officers shall seek to act responsibly as custodians of the public trust and shall avoid any transaction that might impair public confidence while conforming to all applicable statutes and regulations governing the investment of public funds.
5. **Mitigating Credit Risk and Market Risk.** Credit risk shall be mitigated by diversifying the fund among issues and issuers so that the failure of any one issue or issuer would not result in a significant loss of income or principal to participants. Because longer-term securities generally have greater market risk than shorter-term securities, market risk will be mitigated by establishing a maximum weighted average maturity or duration for the portfolio. Occasional market losses on individual securities are inevitable with active portfolio management and must be considered within the context of the overall investment return.

Scope: It is recommended that MPS mirror the intent of California Education Code Section 41015, and invest all or part of funds deposited in a Special Reserve Fund, or any surplus monies not required for the immediate necessities of MPS in any of the investments specified in California Government Code Sections 16430 or 53601.

Special Reserve Funds are hereby defined as those funds, which the Board has designated for capital outlay, or other purposes, where an accumulation over a period of fiscal years is desired.

MPS shall make investments following the guidelines of the Uniform Prudent Investor Act. (Probate Code Section 16045, *et seq.*)

This Policy covers all funds and investment activities under the direct authority of MPS. The proceeds obtained from the issuance of bonds shall be invested in accordance with the applicable bond documents. If the bond documents are silent as to the investment of the proceeds, the bond proceeds will be invested in the securities permitted by this Policy.

COMPLIANCE WITH STATE AND FEDERAL SECURITIES LAWS

MPS will take reasonable steps to ensure that any debt offering issued by MPS complies fully with all applicable state and federal securities laws. In connection with all debt offerings issued by MPS, MPS will retain bond counsel and disclosure counsel to review the offering materials prepared in connection with the debt offering to ensure that disclosures contained in offering materials comply with federal and state securities laws. MPS has implemented procedures to ensure MPS maintains compliance with continuing disclosure requirements. The Chief Executive Officer shall be responsible for reviewing the offering materials regarding the accuracy of information disclosed in such materials.

CHANGES TO INVESTMENT POLICY

This Policy will be reviewed, as needed, to ensure its consistency with the objectives of income, growth and safety, and changes in applicable laws and financial trends. Any proposed amendments to the Investment Policy will require approval by the MPS Board of Directors. This Policy and modifications to it must be approved by the Board of Directors at a public meeting.

COMPLIANCE WITH INVESTMENT POLICY

All outside investment advisors/managers, attorneys and other financial professionals employed or retained by MPS and/or its representatives, including without limitation financial advisors, underwriters, bond counsel, and disclosure counsel, must review this policy and confirm that they have reviewed this Investment Policy and will fully comply with these policies.

Responsibilities:

DELEGATION OF AUTHORITY

Management responsibility for the investment program is hereby delegated by the Board of Directors to the CEO and the Oversight Committee, as deemed appropriate or necessary, who shall thereafter assume full responsibility for those transactions until the delegation of authority is revoked. The Board of Directors may review and renew the delegation of authority each year. The CEO may delegate the day-to-day operations of investing to his/her designee(s) but not the

responsibility for the overall investment program. The CEO and/or his/her designee(s) shall make all investment decisions and transactions in strict accordance with state law and with this Policy.

If authorized by the Board of Directors, the CEO and Oversight Committee may utilize an external investment advisor to assist with investment decision-making and trade execution authority. The investment advisor shall be under the supervision of the approved Oversight Committee and shall follow this Policy and such other written instructions as are provided.

The CEO, his/her designee(s) and/or Oversight Committee, acting in accordance with written procedures and policies and exercising due diligence, shall be relieved of personal liability for an individual security's credit risk or market price changes, provided deviations from expectations are reported in a timely fashion and appropriate action is taken to control adverse developments.

The Board of Directors shall ensure that its fiduciary responsibilities concerning the proper management of MPS' funds are fulfilled through appropriate investment structure, internal and external management, consistent with all policies and procedures. Based on the advice and recommendations of the CEO and Oversight Committee.

The CEO and Oversight Committee are not held liable for less than desirable outcomes, rather, they are responsible only for adherence to procedure and processes. The CEO and Oversight Committee is responsible for the development, recommendations, implementation and maintenance of all investment policies.

Procedure:

INTERNAL CONTROLS

The CEO and Oversight Committee shall establish a system of written internal controls to regulate MPS's investment activities, including the activities of any subordinate officials acting on behalf of MPS. Procedures should include references to individuals authorized to execute transactions or transfers, safeguard agreements, (including repurchase agreements, wire transfer agreements, collateral/depository agreements), and banking services contracts, as appropriate. As part of the annual audit, MPS's external auditor will perform a review of investment transactions to verify compliance with policies and procedures. The Oversight Committee will sign off on internal control procedures as appropriate.

The controls shall be designed to prevent loss of public funds due to fraud, employee error, and misrepresentation by third parties, unanticipated market changes or imprudent actions by employees of the Charter School. The Charter School shall seek to maintain a debt burden factor of 1 - 2% of the Charter School's unrestricted general fund revenues.

AUTHORIZED FINANCIAL INSTITUTIONS AND DEALERS

It shall be MPS' policy to purchase securities only from authorized institutions and firms. The CEO and Oversight Committee shall maintain a list of authorized

broker/dealers and financial institutions that are approved for investment purposes. MPS shall use at least one authorized broker/dealer to advise MPS on investments.

No deposit of public funds shall be made except in a qualified public depository as established by state laws. If an external investment advisor is authorized to conduct investment transactions on behalf of MPS, the investment advisor may use its own list of approved broker/dealers and financial institutions for investment purposes consistent with MPS' policies and existing laws.

For broker/dealers of government securities and other investments, MPS shall select only broker/dealers who are licensed and in good standing with the California Department of Securities, the Securities and Exchange Commission, the Financial Industry Regulatory Authority and/or other applicable self-regulatory organizations. Any permitted investment shall be purchased either from a "primary" or regional broker/dealer qualifying under SEC Rule 15c3-1 (uniform net capital rule) or a "well capitalized" financial institution, as defined in Title 12 of the Code of Federal Regulations ("CFR") Part 6.4.

Before engaging in investment transactions with a broker/dealer, the CEO and Oversight Committee shall have received from said firm a signed Certification Form. This form shall attest that the individual responsible for MPS's account has reviewed MPS's Investment Policy and that the firm understands the policy and intends to present investment recommendations and transactions to MPS that are appropriate under the terms and conditions of this Investment Policy. Any broker, brokerage, dealer or securities firm that has made a contribution to the Charter School, any member of the Board of Directors, or any candidate for those offices is ineligible for selection by the Charter School.

AUTHORIZED AND SUITABLE INVESTMENTS

In making any decision relative to the investment of funds, each of the following factors must be considered, and properly documented:

1. General economic conditions,
2. Expected tax consequences, if any, of investment decisions or strategies,
3. Expected total return from the income and appreciation of investments,
4. Other resources of the organization,
5. The needs of the organization and the fund to make distributions and preserve capital.

INVESTMENT TYPE DESCRIPTIONS

Investments not specifically listed below are prohibited. Consistent with the requirements of law and this Investment Policy, the Charter School may place orders for the execution of transactions with or through such broker/dealers, banks or counterparties as may be selected from time to time. All securities must be U.S. dollar denominated. To the extent consistent with the objectives stated above, the investment restrictions outlined below, and the investment limitations specified herein, the Charter School may invest in the following areas.

State and Local Agencies. Registered treasury notes or bonds of this or any of the

other forty- nine United States, including bonds payable solely out of the revenues from a revenue-producing property owned, controlled, or operated by a state or by a department, Board of Directors, agency, or authority of this state or any of the other forty-nine United States.

Bonds, notes, warrants, or other evidences of indebtedness of any local agency within this state (including MPS), including bonds payable solely out of the revenues from a revenue- producing property owned, controlled, or operated by the local agency, or by a department, Board of Directors, agency, or authority of the local agency.

United States Treasury Issues. United States Treasury notes, bonds, bills, or certificates of indebtedness, or those for which the faith and credit of the United States are pledged for the payment of principal and interest.

U.S. Agencies (Federal Agency Obligations). Federal Agency or United States government- sponsored enterprise obligations, participations, or other instruments, including those issued by or fully guaranteed as to principal and interest by federal agencies or United States government- sponsored enterprises.

Supranationals. Supranational organizations are international financial institutions that are generally established by agreements among nations, with member nations contributing capital and participating in management. Supranational bonds finance economic and infrastructure development and support environmental protection, poverty reduction, and renewable energy around the globe. MPS may purchase the United States dollar denominated senior unsecured unsubordinated obligations issued or unconditionally guaranteed by the International Bank for Reconstruction and Development, International Finance Corporation, or Inter- American Development Bank.

Bankers' Acceptances. Bankers' acceptances otherwise known as bills of exchange or time drafts that are drawn on and accepted by a commercial bank. Purchases of bankers' acceptances may not exceed 180 days maturity. Eligible bankers' acceptances are restricted to issuing financial institutions with short-term debt rating of at least "A-1," or its equivalent, by a nationally recognized statistical rating organization (NRSRO) or a long-term rating of not less than "A" from a NRSRO.

Commercial Paper. Commercial paper rated the highest ranking or of the highest letter and number rating as provided for by a NRSRO. Eligible commercial paper shall be of 'prime' quality of the highest ranking. The commercial paper shall not exceed 270 days maturity. The entity that issues the commercial paper shall meet all of the following conditions in either paragraph (a) or paragraph (b):

- a) Has total assets in excess of five hundred million dollars (\$500,000,000), is organized and operating within the United States as a general corporation, and has debt other than commercial paper, if any, that is rated "A" or higher by a NRSRO.
- b) Is organized in the United States as a special purpose corporation, trust, or limited liability company, has program-wide credit enhancements including, but not limited to overcollateralization, letters of credit or a surety bond, has commercial paper that is rated "A-1" or higher, or the equivalent, by a NRSRO.

Split ratings (i.e. A2/P1) are not allowed.

Placement Service Deposit. Deposits placed through a deposit placement service shall meet the requirements under Government Code Section 53601.8. The full amount of the principal and the interest that may be accrued during the maximum term of each deposit shall at all times be insured by federal deposit insurance.

Negotiable Certificates of Deposit. Negotiable certificates of deposit (NCDs) issued by a nationally or state-chartered bank, a savings association or a federal association, a state or federal credit union, or by a federally licensed or state-licensed branch of a foreign bank. Purchases are limited to institutions which have long-term debt rated at least in the “A” category, or its equivalent, by a NRSRO, and/or have short-term debt rated at least “A-1,” or its equivalent, by a NRSRO. NCDs may not exceed 5 years in maturity. In combination with placement service CDs, a maximum of 30 percent of the portfolio may be invested in this category. The amount invested in NCDs with any one financial institution in combination with any other securities from that financial institution shall not exceed ten percent of the portfolio. Quarterly, the Charter School will monitor custodial credit risk and report the outcome to the Board of Directors. All deposits are to be in FDIC insured institutions and will be reviewed as to the nature and extent of its present compliance with regulations, federal regulatory requirements, profitability/loss trend, liquidity and capital ratios.

Repurchase Agreements. Investments in repurchase agreements for the purpose of this Investment Policy Statement (as defined by section 53601(j) of the California Government Code) means a purchase of securities by the Charter School pursuant to an agreement by which the seller will repurchase the securities on or before a specified date and for a specified amount and will deliver the underlying securities to the Charter School by book entry, physical delivery, or by third party custodial agreement. Repurchase agreements are to be used as short-term investments not to exceed one year. The following collateral restrictions will be observed: Only United States Treasury securities or Federal Agency securities will be acceptable collateral. All securities underlying repurchase agreements must be delivered to MPS’s custodian bank or be handled under a properly executed tri-party repurchase agreement. The total market value of all collateral for each repurchase agreement must equal or exceed 102% of the total dollar value of the money invested by MPS for the term of the investment.

Repurchase agreements are required to be collateralized by securities or cash authorized under California Government Code Section 53601(j)(2). Collateral will be held by an independent third party with whom the Charter School has a current custodial agreement. A clearly marked evidence of ownership (safekeeping/custody receipt) must be supplied to the Charter School and retained. The Charter School retains the right to substitute or grant substitutions of collateral. Investments in repurchase agreements may be collateralized by any securities authorized within this section. Agreements are subject to California Government Code Section 53601 and must comply with the delivery requirements and the maturity provision from Section 53601.

Medium-Term Notes. Medium-term notes defined as all corporate and depository institution debt securities with a maximum remaining maturity of five years or less, issued by corporations organized and operating within the United States or by depository institutions licensed by the United States or any state and operating within the United States. Purchases are limited to securities rated at least in the “A” category,

or its equivalent, by a NRSRO.

Money Market Funds. Shares of beneficial interest issued by diversified management companies that are money market funds registered with the Securities and Exchange Commission that invests solely in U.S. Treasuries and Federal Agency obligations and repurchase agreements relating to such obligations

Mutual Funds. Shares of beneficial interest issued by diversified management companies that invest solely in securities and obligations authorized by this policy. The company shall have met either of the following criteria: (A) Attained the highest ranking or the highest letter and numerical rating provided by not less than two NRSROs, (B) Retained an investment adviser registered or exempt from registration with the Securities and Exchange Commission with not less than 5 years of experience managing money market mutual funds with assets under management in excess of five hundred million dollars (\$500,000,000).

Local Government Investment Pools Joint Powers Authority (LGIP JPA.) Shares of beneficial interest issued by a joint powers authority organized pursuant to Government Code Section 6509.7. To be eligible for purchase, the pool must meet the requirements of California Government Code Section 53601(p), the pool must seek to maintain a stable Net Asset Value (“NAV”), and the pool must be rated at least “AAA,” or its equivalent, by a NRSRO.

Mortgage- and Asset-Backed Securities. Any mortgage pass-through security, collateralized mortgage obligation, mortgage-backed or other pay-through bond, equipment lease-backed certificate, consumer receivable pass-through certificate, or consumer receivable-backed bond of a maximum of five years’ maturity. Securities eligible for investment under this subdivision shall be issued by an issuer having at least an “A” rating, or its equivalent, for the issuer’s debt as provided by a NRSRO and rated at least “AA”, or its equivalent, by a NRSRO.

SAFEKEEPING AND CUSTODY

All deliverable security transactions entered into by MPS shall be conducted on a delivery- versus-payment (DVP) basis. To protect against potential losses by collapse of individual securities dealers, and to enhance access to securities, interest payments and maturity proceeds, all securities owned by MPS shall be held in safekeeping by a third party bank trust department, acting as agent for MPS under the terms of a custody agreement executed by the bank and by MPS. The only exception to the foregoing shall be depository accounts and securities purchases made with: (i) LAIF and government investment pools and, (ii) money market funds, since the purchased investments are not deliverable. Evidence of each these investments will be held by MPS.

MAXIMUM MATURITIES

The CEO and Oversight Committee shall maintain a system to monitor and forecast revenues and expenditures so that funds can be invested to the fullest extent possible. Maturities of investments will be selected to provide necessary liquidity, manage interest rate risk, and optimize earnings. Because of inherent difficulties in accurately forecasting cash flow requirements, a portion of the

portfolio should be continuously invested in readily available funds.

The maximum maturity of individual investments shall not exceed the limits set forth in the Authorized and Suitable Investments section. If the section does not specify a maturity limit, no investment shall have a remaining maturity in excess of five years from the date of purchase unless MPS has granted its express authority to make that investment either specifically or as a part of an investment program no less than three months prior to the investment.

INVESTMENT RESTRICTIONS

Credit Ratings

Credit ratings will be applied at the time of purchase of a security. A subsequent downgrade in a security's credit rating will not constitute a violation of the Investment Policy. Securities which are downgraded below the minimum acceptable rating levels must be reviewed for possible sale within a reasonable amount of time.

U.S. Government obligations are exempt from the credit rating requirements listed below.

The credit ratings referred to below must be assigned by one of the following NRSROs: Standard & Poor's Corporation ("S&P"), Moody's Investors Service, Inc. ("Moody's"), and Fitch Ratings ("Fitch").

- a) Short-term debt ratings – (two of the following and not less than the following) “A-1” or “SP-1” (S&P); “P-1” or “MIG 1/VMIG 1 (Moody's); or “F1” (Fitch) Ratings.

Split ratings are not allowed, i.e. A-1/P-1/F2 or similar. An issuer of short-term debt must have no less than an “A” rating on long-term debt.

- b) Long-term debt ratings – Investments purchased with remaining maturities of 397 days or less- shall be rated by at least two NRSROs and have obtained no less than an “A” rating by any.

Investments purchased with remaining maturities longer than 397 days– shall be rated by at least two NRSROs and have obtained no less than an “AA” rating by any. If an issuer of long-term debt has a short-term rating, then it may not be less than A-1/SP-1 or P-1/MIG1 or F1.

- c) Repurchase Agreement counterparties shall have a minimum short-term rating, or counterparty rating, of no less than A-1 or equivalent by two NRSROs and have capital of not less than \$500 million.
- d) Any issuer that has been placed on “Credit Watch-Negative” by a NRSRO will be removed from our approved list unless the following criteria are met: The issuer has (a) an A-1+ or F1+ short-term rating; or (b) at least an AA or Aa2 long- term rating.

DIVERSIFICATION AND MATURITY RESTRICTIONS

It is the policy of the Charter School to diversify its funds. Investments are diversified to minimize the risk of loss resulting in over concentration of assets in a specific

maturity, specific issuer, or a specific class of securities. Diversification strategies shall be established by the Charter School and periodically reviewed.

1. Authorized Investments

The following diversification limits will be applied at the time of purchase of a security.

Type of Investment	Cal. Gov. Code % of Funds Permitted	Cal Gov. Code Maximum Final Maturity
U.S. Treasury Securities	100%	5 Years
U.S. Government Agency Securities	100%	5 Years
Municipal Debt	100%	5 Years
Medium-Term Notes	30%	5 Years
Bankers Acceptances	40%, 30% of a single issuer	180 Days
Commercial Paper	40%, 10% of a single issuer	270 Days
Negotiable Certificates of Deposits	30%	5 Years
Repurchase Agreements	100%	1 Year
Mutual Funds	20%, 10% in a single fund	N/A
Investment Pools	100%	N/A

2. Maturity

The maximum maturity of any investment purchased will be five years with the exception of investments authorized by the Board of Directors to be invested in longer than five year maturities. For purposes of calculating final maturity, the earlier of final maturity date or mandatory put or tender option date will be used.

PROHIBITED TRANSACTIONS

At the time of purchase, all permitted investments shall conform in all respects with this Investment Policy, as may be amended from time to time. No investment prohibited by California Government Code shall be permitted herein.

Any investment transactions, credit risk criterion, percentage limitations or market valuation that are not in compliance with this Investment Policy and cannot be corrected without penalty at time of purchase must be documented and approved by the Charter School in writing as soon as possible. Thereafter, action shall be taken by the Charter School to correct such matter as soon as practical. If a percentage restriction is

adhered to at the time of purchase, a later increase or decrease in percentage resulting from a change in values or assets will not constitute a violation of that restriction.

The following transactions are prohibited:

- a) Borrowing for investment purposes (“Leverage”).
- b) Reverse Repurchase Agreements, as defined by California Government Code Section 53601(j)(3) and (j)(4) or otherwise.
- c) Structured Notes (e.g. inverse floaters, leveraged floaters, structured certificates of deposit, equity-linked securities, event-linked securities). This includes all floating- rate, adjustable-rate or variable-rate securities in which a change in interest rates or other variables that can reasonably be foreseen to occur during their term would result in their market value not returning to par at the time of each interest rate adjustment.

B

Simple “floating rate notes,” whose periodic coupon adjustment is based on a short- term (one-year or less) rate index (such as Treasury bills, federal funds, prime rate or LIBOR) and which have a reasonable expectation of maintaining a value of par at each interest rate adjustment through final maturity, are exempt from this definition. Additionally, U.S. Treasury and Agency zero coupon bonds, U.S. Treasury and Agency strips, Resolution Funding Corporation (“REFCORP”) strips or other callable securities which otherwise meet the quality, maturity and percent limitations assigned to their respective security category, are exempt from this section.

- d) Structured Investment Vehicles (“SIV”).
- e) Derivatives (e.g. options, futures, swaps, swap options, spreads, straddles, caps, floors, collars) shall be prohibited.

D

ETHICS AND CONFLICT OF INTEREST

The Charter School and all persons involved in the investment process shall refrain from personal business activity which could create a conflict with proper execution of the investment program, or which could impair the ability to execute impartial investment decisions. The Charter School and all treasury and investment personnel shall disclose to the Board of Directors any material financial interests in financial institutions, broker dealers and vendors (“outside entities”) and shall disclose any material financial investment positions in such outside entities.

PERFORMANCE STANDARDS

The investment portfolio shall be designed with the objective of obtaining a market rate of return throughout budgetary and economic cycles, commensurate with the investment risk constraints and the cash flow needs, but focusing on preservation of capital and then liquidity as the most important objectives, with yield as the least important objective.

The Charter School’s investment strategy is to actively manage the portfolios to create less risk than a benchmark comparable index and to use economies of scale to invest and administer the program at a reasonable cost. Given this strategy, the

basis used by the Charter School to determine whether market yields are being achieved shall be the indices most comparable to the fund, such as money rate data published in Barron's, The Wall Street Journal, Bloomberg, etc. or other bond fund indices. The standards enumerated herein do not constitute a guarantee of the fund's performance.

Revision History:

Revision	Date	Description of changes	Requested By
	3/09/17	Initial Release	
	6/14/17	Legal review and revision	

Accounting Policies, Procedures and Forms

SOP # REV101 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV101 SALES RECEIPT PROCESSING

Policy: To ensure the most accurate process for billing for services, sales receipts will be properly evaluated and approved prior to entry into the accounting system.

Purpose: This procedure outlines the activities and responsibilities involved in verifying the acceptability of all sales receipts.

Scope: These procedures are to be followed for all sales receipts.

Responsibilities:

Back-office provider approves sales receipt documentation.

Procedure:

1.1 DOCUMENT VERIFICATION

1.2 Sales Receipts are often used for Parenting Fees and other similar fees. Verify that all of the correct documents have been used and are present to support the sales receipt transaction. The following documents are required to complete the Sales Receipt transaction:

- Document identifying what the money collected is for
- Approval or authorized signature for the course
- Customer, parent, or other correspondence or support documentation, etc
- Complete the Back-office provider Deposit Log

1.3 Verify that all required information is available to complete the sales receipt.

1.4 Review the customer's Accounts Receivable aging and determine that the customer is current with their payments and that the new sales receipt will not affect their balance.

REV101 Sales Receipt Processing
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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

REV101 Sales Receipt Processing

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SOP # REV102 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

**Title: REV102 INVOICING, ACCOUNTS RECEIVABLE,
 RECEIVABLE ACCRUALS**

Policy: The Finance Department is responsible for the timely preparation and distribution of invoices to optimize cash flow and customer payments. The Finance Department with the support of Back-office provider will also maintain accurate records over Accounts Receivables and Accruals and abide by proper internal controls.

Purpose: To explain the methods for the preparation of invoices, accounts receivable, and receivable accruals records processing.

Scope: This procedure applies to all revenue earned and services provided by the company.

Procedure:

1.1 SALES RECEIPT REVIEW

1.2 A formal invoice is not always applicable such as when service fees are collected for items such as Parenting.

1.3 The SALES RECEIPT should contain all pertinent billing information as part of the company's sales receipt procedure. However, as part of proper internal control, Billing will verify the information contained on the customer's sales receipt documentation.

As part of this review process, the propriety and accuracy of contact information, prices, description of services, extensions and footings will be determined.

2.1 INVOICE PREPARATION AND POSTING

2.2 The next sequentially numbered Invoice (see example REV102 Ex1 INVOICE) will be prepared from the information from the Federal, State, or Local Grant or Contract Language including all reimbursable costs and will include the invoice date, service item, description of services or billing information, quantity, rate, class or program code, price and extended amounts and the customer's billing addresses.

2.3 Post the invoice by saving the transaction.

3.1 DISTRIBUTION

3.2 Send one copy of the invoice to the customer and retain a second copy of the invoice in the customer file.

4.1 ACCOUNTS RECEIVABLE

4.2 Accounts Receivable will receive and process payments from customers in accordance with the CASH RECEIPTS procedure.

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- 6.1 On a monthly basis, Accounts Receivable will generate an aged trial balance of customers' accounts with individual invoice information and days outstanding and will forward to Finance Manager and Chief Financial Officer for their follow up on any aged invoices.
- 6.2 Accounts Receivable will generate monthly statements of outstanding customers' accounts and issue them to customers no later than 10 days after each month end.
- 6.3 Accounts Receivable will issue Credit Memos to customers upon receipt of approved changes in the terms.

5.1 RECEIVABLE ACCRUALS

- 5.2 Monthly receivable accruals are at the discretion of the Chief Financial Officer and the Finance Manager when those amounts are reasonably known and quantifiable. Fiscal year end receivable accruals are required to be quantified and recorded no later than August 15th.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back office service provider	Oswald Diaz, CFO

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REV102 Ex1 INVOICE

INVOICE NO. _____

CUSTOMER:

Item	Description	Qty	Rate	Class	Amount
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Total

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**REV102 Ex 2 ACCOUNTS
RECEIVABLE WRITE-OFF
AUTHORIZATION**

Customer:

Date:

Invoice No's:

Amount of Write-Off

TOTAL \$

JUSTIFICATION

Summary of Collection Actions To Date:

(Include brief description of collection actions taken by accounting, other Company departments and outside collection agency or legal, if applicable)

Approvals:

Credit Manager: _____

Date: _____

Controller: _____

Date: _____

REV102 Invoicing, Accounts Receivable, Receivable Accruals
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SOP # REV103 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV103 PROJECT(Grant/Contract) REVENUE: PROGRESS BILLING

Policy: Progress billings will be made to clients on a timely basis throughout the life of the project. Projects are typically considered Federal, State, and Local Grant contracts. These billings will be accurate and easily understood by both parties involved.

Purpose: The purpose for creating progress billings is to obtain payment for the portion of labor and materials, i.e. “reimbursed costs” used up to a certain point in time and before the project is fully completed. This improves the cash flow typical of long-term projects or assignments. This procedure applies to all Federal, State, and Local Grants and Contracts, Service agreements or Projects provided by the Organization.

Scope: This procedure applies to all service agreements or projects provided by the Organization.

Responsibilities:

The Finance Department is responsible for the confirmation of all final program amounts and is responsible for knowing the correct procedures to be followed for each contract.

Procedure:

1.1 CONTRACT TYPES

1.2 Reimbursement for Services. Progress billing for Reimbursement for Services contracts requires Finance teams to be up to date and monitor the services being provided according to the terms of each contract. The Finance team will enter into the reimbursement request the allowable costs that may be billed according to the contract. From time to time and at the end of the contract, the Chief Financial Officer reviews the billings of the contract and ensures that all available opportunities to recover reimbursable costs have been considered.

1.3 Set Contracts. Set contracts such as with the individual charter schools involve reimbursement for costs such as building rental and an allowance for the amount of apportionment attendance earned. Although the contract is set by terms of the contract, since student attendance can vary, the invoicing for these types of contracts is the same amount throughout the fiscal year and reconciled at the end of the year to account for the final attendance counts.

REV103 Project (Grant/Contract)Revenue: Progress Billing
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2.1 BREAKDOWN OF CONTRACT AMOUNT

2.2 The Finance Department with the support of Back-office provider is responsible for the final reconciliation of all grant and other contracts at the end of the year by reviewing final billings prepared by the Finance team and/or the School Principal. Normally, the contractual agreement will specify the procedures for payment and may also specify the form of the breakdown of contract amount that is required. Care should be taken to be sure that all costs, services, and fees are fully billed and accounted for in each contract.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider provider and revision of responsibilities.	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

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SOP # REV104 Revision: 1
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV104 ACCOUNT COLLECTIONS

Policy: All open accounts receivable with late or delinquent payment activity will be handled in a timely and effective manner to ensure maximum collections and an optimum accounts receivable turnover ratio.

Purpose: To provide the actions and methods for processing late or delinquent payments.

Scope: This procedure applies to the Accounts Receivable Department involved with collection of past due accounts receivable. The Finance team and the Chief Financial Officer may be involved in reference special arrangements.

Responsibilities:

The Finance team reviews all records for a customer to determine a possible explanation for non-payment prior to commencing the collection process.

Definition: Bad Debt consists of unpaid accounts receivable invoices that are considered to be uncollectible.

Debt collector is any person who regularly collects debts owed to others. This includes attorneys who collect debts on a regular basis.

Procedure:

1.1 COLLECTION PROCESS

1.2 No matter how careful customers are screened prior to credit approval, slow pay or delinquent accounts will occur from time to time. Once an account becomes past due by even a few days, the collection process should commence immediately. Studies have shown that the sooner the collection process starts then the more likely that the debt will be collected.

1.3 Prior to commencing the collection process, the following should be reviewed by the assigned Finance team:

- Verify that after the Invoice was immediately sent out for all billings to the customer and sent to the correct billing address.
- Make certain that the Organization has not received the customer's payment or applied it to the wrong account. These seem obvious, but it can avoid an uncomfortable situation in wrongly accusing the customer of delinquent payments.

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- Review the customer's past payment activity. Determine if they are chronically late and what their response has been to any other overdue notices to determine payment patterns or trends.

- 1.4 Upon review of the above, the Accounts Receivable Representative should then proceed with the collection process by completing an REV104 Ex1 ACCOUNT COLLECTION CONTROL Form. This form will assist in planning and tracking the collection effort. Depending on the amount and the customer situation, the representative can choose to follow-up with collection letters, telephone calls or both.

Record all actions taken (late payment notice, telephone call, etc.) with a date on an ACCOUNT COLLECTION CONTROL Form filed in the customer folder. All customer agreements and explanations should be noted. If payment has not reached the Organization by the expected date, immediate follow-up action should be taken with another collection call or letter. The longer an overdue account is ignored, the longer the customer will ignore it, too.

- 1.5 Telephone communication will often speed up the collection process. Credit representatives, when speaking with a delinquent account, should observe a few tips or principles.

- Identify yourself and the Organization and state the reason for calling. Be direct and use a controlled, confident voice. Concentrate on listening to the customer and don't rush through the call.
- Get the Facts - The most powerful tool is knowledge. During the phone conversation, try to gain as much insight into the situation as possible. Remember, the goals and objectives are to:

Collect the money!

Identify reasons for non-payment

Settle on an agreement for clearing the debt, including special payment plans and exact dates when a check will be sent.

- Never argue, accuse or be condescending - Verbally fighting or talking down to the customer will only serve to produce negative feelings and may hamper the collection effort. The ultimate purpose is to secure payment, and this is best accomplished without becoming defensive or irritated.
- There are several common objections, complaints and excuses used to elude payment. Study the following examples to learn the most effective responses to the most frequently used ploys.

"I didn't get the invoice." - Respond by verifying the debtor's name and address, and then review the account information with them.

"The check is in the mail." - Extend your thanks, then ask for a check number, amount, date posted and address to which it was mailed.

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"Your payment is being processed." - Ask when the payment will be ready for the mail. Determine the process that the payment undergoes after it leaves your contact's desk.

"I need proof of delivery." - Give the customer the name of the person who signed the delivery slip.

"The computer is down." - When do you expect it to be up? Can we get a manual payment?

"I'll pay you when we get paid." - Respond calmly, but make a direct request for payment, such as "When can I expect payment?"

"I have no money" - Create a payment plan. Be flexible and consider alternatives offered by the customer. Work toward making the plan acceptable to both of you.

- 1.6 Many people find it difficult to confront customers regarding delinquent payments. Just keep in mind that it is the customer, who should feel uncomfortable in this situation.
- 1.7 If customers stop paying, their phone has been disconnected, and you cannot find them, consider using these resources to locate these debtors and their assets:
- City directories
 - Post office (for a forwarding address)
 - A customer's employer
 - Department of motor vehicle license and registration records
 - "In case of emergency" contact, references or closest relatives listed on a credit application
 - Old files and correspondence
 - The Internet (i.e. <http://www.isleuth.com/peop.html>)
 - Skip-tracing services or private investigator
 - Credit bureau reports
 - Neighbors
 - Directory assistance

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2.1 SERIOUSLY DELINQUENT OR UNRESPONSIVE ACCOUNTS

2.2 When an account becomes more than 60 days past due, the immediate target of securing prompt payment should take on a greater sense of urgency. The Finance Manager should review the account with Accounts Receivable to determine if the customer's business is valued.

If their business is valued, the following strategies may be used to collect payment:

- Restrict any further credit until the past due amount is paid in full.
- Withhold services already entered into. The harsh reality of having a MERF customer have to move from a MERF location or find a new provider often can spur a delinquent account into action.

2.3 If all other avenues for collection of the account have been exhausted, the Finance Manager, after consulting with the Chief Financial Officer, may want to consider and authorize the use of an outside collection agency.

2.4 All uncollectible accounts will be reviewed by the Finance Manager for disposition.

3.1 WORKING WITH COLLECTION AGENCIES

3.2 Collect all material records for the debt in question and send them to the collection agency. The agency will require a copy of the invoice, proof of delivery, and/or any other correspondence that may help them collect the debt.

3.3 Record the date the debt was sent to collections in the accounts receivable file.

3.4 If payments are received after the debt has been sent to collections, then notify the collection agency immediately in order to stop any further collection efforts. The agency will take their fee for any debt that has been collected once it has been registered by the agency.

3.5 If all other avenues for collection of the account have been exhausted, the Organization should consider further legal action.

4.1 WRITING OFF UNCOLLECTED DEBT

4.2 Write-off any debts remaining uncollected or that are returned from the collection agency and record as a bad debt expense and deduct from accounts receivable.

4.3 If any payments are received after being written-off from accounts receivable, then receive them in as income in the period received.

4.4 If bad debt is a recurring problem then consider setting up a reserve account or allowance for bad debt at the beginning of the year.

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References:**A. FAIR DEBT COLLECTION PRACTICES ACT (FDCP)**

The FDCP requires that debt collectors treat consumers fairly and prohibits certain methods of debt collection. Personal, family, and household debts are covered under the Act. This includes money owed for the purchase of an automobile, for medical care, or for charge accounts. Business debt is not included.

Debt collectors may not 1) harass, oppress, or abuse the debtor or any third parties they contact. 2) Use any false or misleading statements when collecting a debt.

For example, debt collectors may not:

- Use threats of violence or harm;
- Publish a list of consumers who refuse to pay their debts (except to a credit bureau);
- Use obscene or profane language; or
- Repeatedly use the telephone to annoy someone.
- Falsely imply that they are attorneys or government representatives;
- Falsely imply that the debtor may have committed a crime;
- Falsely represent that they operate or work for a credit bureau;
- Misrepresent the amount of the debtor's debt;
- Indicate that papers being sent to the debtor are legal forms when they are not
- Indicate that papers being sent to the debtor are not legal forms when they are.
- Give false credit information about the debtor to anyone, including a credit bureau;
- Send the debtor anything that looks like an official document from a court or government agency when it is not.
- Use a false name.
- Collect any amount greater than the debtor's debt, unless the debtor's state law permits such a charge;
- Deposit a post-dated check prematurely;
- Use deception to make the debtor accept collect calls or pay for telegrams;
- Take or threaten to take the debtor's property unless this can be done legally.
- Contact the debtor by postcard.
- Say the debtor will be arrested if they do not pay the debt;
- Say they will seize, garnish, attach, or sell the debtor's property or wages, unless the collection agency or creditor intends to do so, and it is legal to do so.

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- Say they will take actions, such as a lawsuit against the debtor, when such action legally may not be taken, or when they do not intend to take such action.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	9/5/17	Revision to clarify processes and positions	

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REV104 Ex1 ACCOUNT COLLECTION CONTROL FORM

Account Name: _____ Date _____ Customer Reply or Action _____

Taken _____

Address: _____

Contact(s): _____

Telephone #'s: _____

Payment Terms: _____

Comments: _____

<u>Invoice</u>	<u>Date Due</u>	<u>Amount</u>	<u>Date Paid</u>	<u>Running Total Due</u>

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Accounting Policies and Procedures

SOP # REV105 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV105 REVENUE RECOGNITION - GRANTS AND CONTRIBUTIONS

Policy: The Organization receives revenue from several types of transactions. It is the policy of the Organization to separate and recognize revenue from grants and contributions separately in the financial statements of the Organization and to comply with all current Federal and California rules regarding solicitation and collection of charitable contributions.

Purpose: To provide a separate accounting of grant and contribution income.

Scope: This procedure applies to all grant and contribution income.

Responsibilities:

Chief Financial Officer and the Finance Department direct the separate accounting for grant revenue and contributions received.

Back-office provider ensures that grant and contribution revenues are separately tracked within the accounting system.

Definition:

Contribution - An unconditional transfer of cash or other assets to the Organization, or a settlement or cancellation of the Organization's liabilities, in a voluntary nonreciprocal transfer by another entity acting other than as an owner.

Condition - A donor-imposed stipulation that specifies a future and uncertain event whose occurrence or failure to occur gives the promisor a right of return of the assets it has transferred to the Organization or releases the promisor from its obligation to transfer its assets.

Restriction - A donor-imposed stipulation that specifies a use for the contributed asset that is more specific than broad limits resulting from the nature of the Organization, the environment in which it operates, and the purposes specified in the Organization's articles of incorporation and bylaws. Restrictions on the Organization's use of an asset may be temporary or permanent.

Nonreciprocal Transfer - A transaction in which an entity incurs a liability or transfers assets to the Organization without directly receiving value from the Organization in exchange.

Promise to Give - A written or oral agreement to contribute cash or other assets to the Organization.

Exchange Transaction - A reciprocal transaction in which the Organization and another entity each receive and sacrifice something of approximately equal value

Procedure:

1.1 GRANT AND CONTRIBUTION REVENUE RECOGNITION

1.2 Grant income – Recognized as income when received, based on incurrence of allowable costs (for cost-reimbursement awards) or based on other terms of the award (for fixed price, unit-of-service, and other types of awards). The types of grant income typically received by the Organization are:

- (a) Education payments for MERF Charter services.
- (b) Various Federal, State, and Local grants and contracts.
- (c) Other types of grant income may be received from time to time.

At year-end, grant income that has been incurred but not yet received are accrued to conform with generally accepted accounting principles.

1.3 Contributions - Recognized as income when received, unless accompanied by restrictions or conditions (see the next section on contribution income).

1.4 CONTRIBUTIONS RECEIVED

A. Distinguishing Contributions from Exchange Transactions

The Organization may receive income in the form of contributions, revenue from exchange transactions, and income from activities with characteristics of both contributions and exchange transactions. The Organization shall consider the following criteria, and any other relevant factors, in determining whether income will be accounted for as contribution income, exchange transaction revenue, or both:

1. The Organization’s intent in soliciting the asset, as stated in the accompanying materials;
2. The expressed intent of the entity providing resources to the Organization (i.e. does the resource provider state its intent is to support the Organization’s programs or that it anticipates specified benefits in exchange?);

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3. Whether the method of delivery of the asset is specified by the resource provider (exchange transaction) or is at the discretion of the Organization (contribution);
4. Whether payment received by the Organization is determined by the resource provider (contribution) or is equal to the value of the assets/services provided by the Organization, or the cost of those assets plus a markup (exchange transaction);
5. Whether there are provisions for penalties (due to nonperformance) beyond the amount of payment (exchange transaction) or whether penalties are limited to the delivery of assets already produced and return of unspent funds (contribution); and
6. Whether assets are to be delivered by the Organization to individuals or other than the resource provider (contribution) or whether they are delivered directly to the resource provider or to individuals or the Organization is closely connected to the resource provider.

B. Accounting for Contributions

The Organization shall recognize contribution income in the period in which the Organization receives restricted or unrestricted assets in nonreciprocal transfers, or unconditional promises of future nonreciprocal asset transfers, from donors. Contribution income shall be classified as increases in unrestricted, temporarily restricted, or permanently restricted net assets based on the existence or absence of such restrictions. See REV107 Restricted Funds for more details.

Unconditional promises to give shall be recorded as assets and increases in temporarily restricted net assets (contribution income) of the Organization in the period that the Organization receives evidence that a promise to support the Organization has been made. Unconditional promises to give that are to be collected within one year shall be recorded at their face value, less any reserve for uncollectible promises, as estimated by management. Unconditional promises to give that are collectible over time periods in excess of one year shall be recorded at their discounted net present value. Accretion of discount on such promises to give shall be recorded as contribution income in each period leading up to the due date of the promise to give. The interest rate that shall be used in calculating net present values of unconditional promises to give is the risk-free rate of return available to the Organization at the time the Organization receives a promise from a donor.

When the final time or use restriction associated with a contributed asset has been met, a reclassification between temporarily restricted and unrestricted net assets shall be recorded.

When it receives support in the form of volunteer labor, the Organization shall record contribution income and assets or expenses if one of the following two criteria is met:

1. The contributed service creates or enhances a nonfinancial asset (such as a building or equipment), or
2. The contributed service possesses all three of the following characteristics:
 - a. It is the type of service that would typically need to be purchased by the Organization if it had not been contributed,
 - b. It requires specialized skills (i.e. formal training in a trade or profession), and
 - c. It is provided by an individual possessing those specialized skills.

Contributed services that meet one of the two preceding criteria shall be recorded at the fair market value of the service rendered.

C. Receipts and Disclosures

The Organization and its donors are subject to certain disclosure and reporting requirements imposed under the Internal Revenue Code and its underlying regulations. To comply with those rules, the Organization shall adhere to the following guidelines with respect to contributions received by the Organization.

For any separate contribution received by the Organization, it shall provide a receipt to the donor. The receipt shall be prepared by the School Principal. All receipts prepared by the Organization shall include the following information:

1. The amount of cash received and/or a description (but not an assessment of the value) of any noncash property received;
2. A statement of whether the Organization provided any goods or services to the donor in consideration, in whole or in part, for any of the cash or property received by the Organization from the donor, and
3. If any goods or services were provided to the donor by the Organization, a description and good faith estimate of the value of those goods or services.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Change in responsibilities	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

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SOP # REV106 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV106 GIFTS-IN-KIND

Policy: MERF may accept contributions of goods or services that can be used to advance the mission of MERF and/or any of its schools or may be converted readily into cash. When accepting a gift-in-kind, the receiver must ask the donor to complete as an example REV106 Ex1 GIFT-IN- KIND FORM. Once the donor has completed the form, the receiver must sign the form and send it immediately to the central office for processing.

Purpose: To ensure that Gift-In-Kind transactions are handled in accordance with IRS guidelines and are properly recorded.

Scope: All Gift-In-Kind transactions.

Responsibilities:

Receiver is responsible for assessing the gift for usefulness to the Organization.

School Principal is responsible for handling donor documentation.

The Financial Analysts are responsible for assessing value of gift and informing Back-office provider so that it can be recorded into the accounting system.

Definition: **Gifts-In-Kind** - Transactions categorized as a voluntary contribution of goods or services that can be used to advance the mission of MERF or can be readily converted to cash and may qualify as a charitable deduction for the person(s) making the gift.

Contributed services cannot be counted as a gift and do not qualify as a charitable tax deduction to the donor. However, a donor of services may be able to deduct expenses incurred while performing said services. In such cases, the donor should be advised to consult with a tax accountant.

Background: The IRS has specific regulations regarding gifts-in-kind. This policy outlines the process an employee of MERF should follow when presented with a gift-in-kind. It limits the liability that may inadvertently be assumed by placing value on gifts or by accepting a gift that does not advance the mission of MERF or cannot be readily converted to cash. It further assures that a donor will receive timely acknowledgement of his/her contribution.

Procedure:

1.1 RECEIPT OF GIFT

2 When presented with a potential gift-in-kind, an individual must assess if the gift can be used to advance the mission of MERF or could be readily converted to cash. If there is any question as to whether the contribution meets either of these.

criteria, the individual should contact his/her immediate supervisor or the central office.

- 2.1** If the gift is accepted, the individual should offer an immediate and sincere expression of gratitude. At that time, the donor should be given a Gift-In-Kind form and be encouraged to complete the form at that time. If the donor is unable or unwilling to complete the form, the receiver may complete the form, write "N/A" as the estimated fair market value, and enter that the form was completed by him/her in the note section in the lower right hand corner.

The individual accepting the gift cannot offer tax advice or dictate the value of the contribution. It is the responsibility of the donor to determine the fair market value of the contribution. **Note:** the value is for MERF internal gift reporting and accounting only; the donor's receipt and/or acknowledgement will not indicate value in any way that could be construed as an endorsement of its value.

- 2.2** If the item is personal property of the donor and is valued at more than \$5,000, the donor must obtain a certified appraisal. The appraisal cannot be dated more than 60 days from the date of the donation. It must be prepared, signed and dated by a qualified appraiser. Federal law requires that the donor pay for the appraisal. (The cost of the appraisal is also tax deductible). This value will be used for gift reporting purposes only.

What constitutes a qualified appraisal:

- I. Appraiser must hold himself or herself out to the public as an appraiser and state credentials showing that he or she is qualified to appraise the type of property being valued.
- II. Appraiser must value the property no more than 60 days before the date of gift; it can be done after the gift has been accepted by the MERF.
- III. Appraiser cannot be (1) the donor, (2) the donee (MERF), (3) any party to the transaction, (4) an appraiser used regularly by (1), (2) or (3), or anyone employed or related to (1),(2), or (3).

The appraisal must contain the following information:

1. A description of the item
 2. Its physical condition
 3. The date (or expected date) of the contribution
 4. Name, address and tax ID number of the appraiser
 5. Qualifications of the appraiser including his/her background, experience and education
 6. A statement that the appraisal was prepared for income tax purposes
 7. Date the item was valued
 8. Appraised fair market value of the item
 9. Method of valuation (income approach; market data approach; replacement cost minus depreciation approach.)
 10. Appraiser must complete Part IV of Section B on form 8283
- 2.3** The individual accepting the gift will sign and date the Gift-In-Kind form only after the donor has irrevocably turned over the gift-in-kind. Once signed, the

form should be turned over to the School Principal immediately for processing and acknowledgement.

- 2.4 The School Principal will notify the Finance team of the contribution. The Finance team will then provide necessary information to Back-office provider so that it can be assigned as an asset or income to the appropriate school or to the central office.

2.1 COMPLIANCE

- 2.2 The IRS allows an individual to deduct the full fair market value of a donated item if it is kept by MERF and used for one of its tax-exempt purposes. If the item is to be converted to cash, then the donor may claim a deduction of the cost value or the fair market value, whichever is less. **It is the sole responsibility of the donor to determine the value of a contributed item; the receiver cannot assign a value to the donated item(s).**

- 2.3 Upon receipt of a gift-in-kind, MERF will issue an acknowledgement to the donor along with a copy of the Gift-In-Kind form. The acknowledgement will contain only a description of the contribution and will not include a statement as to the value of the contribution. It will further contain a statement as to what, if any, goods or services were given in exchange for the contribution. MERF cannot issue an acknowledgement for contributions that cannot be used or readily converted to cash.

- 2.4 For gifts with values exceeding \$5,000, the donor must complete all parts of IRS form 8283 and submit the form to MERF for signature. The School Principal, the Chief Financial Officer and the Chief Executive Officer are the only individuals authorized to sign 8283 forms.

If MERF has signed an IRS form 8283 and then sells, exchanges or otherwise transfers the gift within two years from the date of gift, the central office must file a donee information return, IRS form 8282, within 125 days of disposing the property. MERF will advise the donor if such a transaction occurs as it may affect the charitable tax deduction for which they qualify.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, CFO

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REV106 Ex1 GIFT-IN-KIND CONTRIBUTION FORM

Date: _____

Event Name (if applicable): _____

Donor Information:

Donor Name _____

Contact Person _____

Address _____

City _____ State _____ Zip _____

Daytime phone _____ E-mail Address _____

Gift Description: _____

Estimated fair market value (by donor): \$ _____

Special instructions (e.g., item delivery or pick up, restrictions, etc.):

Please return this form to:

Finance Department

Ph

one: (714)892-5066 13950

Milton Ave. Fax:

(714)362-9588

Suite 200B

Westminster, CA 92683

Per IRS regulations, any item you value over \$500 requires IRS Form 8283; any item you value over \$5,000 requires Form 8283 and a written appraisal.

This form does not serve as a receipt for this contribution, but is intended for our internal record keeping purposes only. A receipt describing the items or merchandise donated will be mailed to the address supplied above. Magnolia Educational & Research Foundation is unable to include the estimated value on the donor receipt. It is the responsibility of the donor to substantiate the fair market value for his/her own tax purposes. The donation of services, although very valuable and much appreciated, is generally not considered tax deductible by the IRS. Please consult with your tax advisor to determine the tax implications of your gift.

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SOP # REV107 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: REV107 RESTRICTED FUNDS

Policy: To properly record and track funds with restrictions in order to ensure the donor’s intended uses are met, assist with cash flow planning purposes, and to stay within compliance with laws relating to use of restricted funds.

Purpose: Generally accepted accounting principles require the Organization to classify funds based on the restrictions provided by the donor. These classifications may be unrestricted, temporarily restricted or permanently restricted. Donor restrictions should be in writing, to ensure proper treatment.

Scope: This procedure applies to funds received that are classified as temporarily or permanently restricted.

Responsibilities:

Back-office provider is responsible for recording restricted donations and releases from restrictions properly in the accounting system. Back-office provider is also responsible for periodic reconciliation of restricted asset totals and monitoring restrictions to determine whether they have been met.

Chief Financial Officer is responsible for monitoring of restrictions and determining whether fulfilling restrictions can be viable for the Organization.

Definition:

Unrestricted Net Assets - net assets whose use is not restricted by donors, even though their use may be limited in other respects, such as by board designation.

temporarily restricted because of an inference that uncollected amounts are intended for future periods.

Temporarily Restricted Net Assets - net assets whose use are limited by donors to either a specified purpose or a later date.

Permanently Restricted Net Assets - net assets whose use are restricted in perpetuity, such as endowments.

Pledges receivable are considered to be

Procedure:

1.1 RESTRICTED FUNDS

1.2 At the time revenue is earned by the Organization, the Financial Analysts with the support of Back-office provider will review any related documentation associated with the revenue to determine whether there are any restrictions on the money.
Examples

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of restrictions are individual donations given with the intent of supporting a particular program or campaign, a grant received to operate a specific program or project, and donations received to hold in perpetuity. This information can be found on the award letter or on the financial instrument itself. If the revenue is determined to contain restrictions, Back-office provider will record in a separate class in the accounting system to keep separate from unrestricted funds.

- 1.3 Temporarily Restricted Funds** – These funds will be monitored for satisfaction of donor restrictions on a regular basis. Once stipulations are met, they are reclassified from temporarily restricted funds to unrestricted funds regardless of when the related expenses will occur. This is known as “net assets released from restrictions.”
- 1.4 Permanently Restricted Funds** – These funds are restricted by the donor for a designated purpose or time restriction that will never expire. The intent is that the principle balance of the contribution will remain as an investment forever, and the Organization will utilize the interest and investment returns, such as with an endowment.
- 2.1 ACCOUNTING FOR RESTRICTED FUNDS**
- 2.2** In addition to the obligation to its donors, the Organization is bound by law to spend contributed dollars as designated. If a condition on restricted funding has not been fulfilled and the money has been spent, the donor can demand that the funds be returned, pursue legal action, or contact the Office of the Attorney General. It is of the utmost importance that donor restricted funds are handled properly.
- 2.3** Do not budget to spend money unavailable to Organization. When planning and budgeting, be mindful of any and all of the time and activity restrictions present on restricted funds. Understand how restrictions will impact cash flow and availability of funds.
- 2.4** Educate staff and board members who are accountable for the Organization’s financial decisions so that they fully understand funding restrictions. Know when the restrictions are satisfied and how to release the funds from restriction.
- 2.5** When analyzing financial reports, pay close attention to unrestricted funds and, unless you are making decisions regarding programming for which the funds have been restricted, avoid basing decisions on restricted funds. Try to focus your attention on the “Unrestricted” amounts. Formatting financial report with columns that delineate unrestricted and restricted funds can be very helpful.
- 2.6** Most restrictions on funds directly relate to the grant or fundraising request. When researching and applying for grants, be aware of any challenges that potential restrictions could present to the Organization.
- 2.7** Fundraising letters and appeals can inadvertently place restrictions on donations. Be certain that managers and donors understand the purpose of contributed dollars and understand if restrictions are present. Also, be certain that staff charged with fundraising understand that appeals can lead to restricted gifts.

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- 2.8** Work with staff to understand the true cost of programming. Allocate all direct costs associated with a program. These allocations help to prepare more accurate budgets for grants and fundraising appeals, and better utilize contributions restricted to specific programs to ease the pressure on limited general operating dollars.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Change in responsibilities	Oswaldo Diaz, CFO

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SOP # PUR101 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: PUR101 VENDOR SELECTION

Policy: To ensure the performance capabilities of all vendors and maintain the internal controls of over the purchasing functions, vendor selection , quality control , and certain procedural requirements.

Purpose: To provide the methods for determining, documenting and, when applicable, inspecting vendors for compliance with Organization policies and contract purchasing requirements.

Purchased products and services should conform to specified requirements. This starts with selection of appropriate suppliers, consultants, and contractors that have the capability and systems to supply products, materials and services to satisfy Organization requirements. Suppliers and consultants are controlled to the extent necessary based on the effect of the purchased items and services on the quality of the Organization's products and services.

Scope: This procedure applies to all vendors of products, materials, and services that directly affect the quality of the Organization's products and services.

Responsibilities:

The Board of Directors shall have authority to approve all contracts including budgeted and non-budgeted items over \$50,000. 90,000

Chief Executive Officer shall have authority to approve all contracts up to and including the amount \$50,000 90,000 for all budgeted and non-budgeted amounts.

School Principal is responsible for initial supplier, contractor, and consultant (Collectively the "Supplier") identification and for collection of business information related to the potential supplier. School Principal shall have the ability to approve purchases up to and including the amount of \$10,000.

All MPS Chief Executive Team Members are responsible for approving contracts up to \$10,000 that are within the approved budget.

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Procedure:

1.0 VENDOR SELECTION

1.1 New vendors are to be evaluated using the following criteria:

- Pricing: competitive pricing is one component of the evaluation and may be outweighed by other factors. Pricing alone will not be a deciding factor unless all else is equal.
- Parts availability and shipping time frame.
- Performance capability (i.e., financial status, sufficient facilities, capability of equipment and employees, professional licenses, years of experience).
- Internal Quality Assurance program: Contractors undergo PEER Review, hold additional licenses, are given preference.
- Reference checks.
- Warranty information if applicable.
- Whether the vendor is debarred from receiving State and/or Federal funds

1.2 Ongoing evaluation of suppliers:

- On-Time Delivery, 100% on time expected (0 days early, 0 days late)
- Quality: (Items (or lots) rejected/Total items (or lots) received) X 100. Ratings less than 95% require corrective action. Exceptions to the 95% Corrective Action requirement may be given where the total quantity of items or lots received is small and at the Controller's discretion.

1.3 Qualified vendors will be maintained on an Approved Vendor List for purchasing. The approved list can be as simple as those vendors that are retained as "active" in the accounting system.

2.0 VENDOR INSPECTIONS

- 2,1 For critical components that the Organization desires to rely on the quality assurance of the vendor to reduce receiving inspection or testing requirements such as with high end computer parts, an on-sight vendor inspection may be performed and approved.
- 2.2 The Controller will coordinate with the Purchase Agent to plan, arrange and designate staff for all vendor inspections when considered necessary by the Chief Financial Officer.

3.1 VENDOR FILES

- 3.2 A vendor file will be prepared and maintained for all vendors on the Approved Vendor List, which will be used for significant or on-going purchasing. The vendor files will be kept alphabetically and should include the following:

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- IRS W-9 Taxpayer Identification Certificate (a PDF download is available at: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>)
- Resale certificates (only required for those that resell their purchases)
- Legal contracts, dealer or marketing agreements, etc.
- Long-term blanket purchase order commitments
- Proof of insurance
- Any other relevant correspondence or documentation

3.3 Form 1099 must be filed at year-end for the proper reporting of income to certain vendors. To determine whether or not one needs to be filed, all non-merchandise vendors should complete an IRS W-9 Request for Taxpayer Identification Number Certificate. A copy can be obtained via the IRS website (www.IRS.gov) or by contacting the local IRS office. The vendor indicates on the form the reporting status. Note: Incorporated vendors do not receive 1099s.

This applies to all contractors for service (repair person, accountant, consultant, etc) who are NOT incorporated, and to all lawyers, regardless of incorporation. It is important to make this determination before engaging the contractor so that all payments can be properly tracked for 1099 reporting purposes at the inception.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/16/15	Segregation of Duties	Oswaldo Diaz, CFO
2	9/5/2017	Revision to clarify processes and positions	
3	2/11/2021	Revision to increase the approval limits	Serdar Orazov, CFO
4	4/7/2022	Revision to increase the approval limits	Steve Budhraj, CFO

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SOP # PUR102 Revision: 3**Prepared by: Central Office****Effective Date: 4/7/2****Approved by: BOD****Title: PUR102 GENERAL PURCHASING**

Policy: All purchases of goods and services shall be consistent with the Board-approved budget. The investment in supplies and capital equipment will be facilitated through the Purchasing Department, maintained at the lowest effective level and supervised consistent with a common set of procedures and controls as required by all regulatory and customer contract requirements.

Purpose: To outline the actions to be taken for 1) the procurement of supplies and capital equipment, 2) the completion of related documents.

Scope: This procedure applies to the purchase of all supplies and capital equipment for all departments within the Organization.

Responsibilities:

All personnel that require a product or service must complete a request in Purchasing Software specifying items for purchase and obtain required approvals.

Chief Financial Officer and the Finance Department are responsible for using good purchasing methods, optimizing price savings, quality or value of products, vendor working relationships, placing orders with approved suppliers, negotiating pricing with suppliers, and forwarding all paperwork to Back-office provider accounts payable for payment.

Back-office provider accounts payable is responsible for payment of invoices only after satisfactory completion or delivery of goods or services has been made.

The School Site Personnel and Other Designated Individuals are responsible for receiving, inspecting materials, and forwarding all paperwork to a designated agent at Back-office provider.

Procedure:**1.1 ORDER DETERMINATION AND REQUISITION**

- 1.2 Purchasing should obtain the optimal price for any purchases. All purchases above **\$10,000** require at least 3 quotes to be obtained. Quotes may be submitted by the requestor, Controller or the Purchase Manager can obtain the 3 quotes. The quotes are entered into Purchasing Software along with evaluation and selection of the best option by the requestor. ~~The Chief Financial Officer reviews the 3 quotes and forwards the recommendations to the Chief Executive Officer for final review and decision.~~

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1.3 For purchases of goods and supplies, a request in the Purchasing Software will be prepared by the originating individual or department. The Purchasing Software request should be completed and approved with the following items and any additional supporting documentation:

- Complete description with part or model numbers and link to website if available
- Engineering drawings and specifications
- Type, Class, Grade required
- Quantity required
- Date required
- Requesting department, account code, and allowance/resource code
- Recommended vendor or source if applicable
- Other requirements
- Special shipping requirements
- Special inspection requirements upon receipt
- Itemized Receipts

For the following purchases, additional information is required:

- Textbooks – Full ISBN
- Airline tickets - passenger(s) legal name(s), date of birth, gender, departure/arrival airport codes and exact dates
- Vehicle rentals - vehicle type, exact dates and exact pick up/drop off locations

1.4 If the requisition is for subcontracted services:

- A complete description of the service to be performed
- Engineering drawings and specifications if appropriate
- Requirements for qualification of personnel
- Other documents such as insurance forms, etc.
- Quality standards to be applied

1.5 Purchasing/Accounting will analyze terms, vendor, pricing, quantity breaks, etc., and will order accordingly in the Organization's best interest. Purchasing will notify the requester of any material variances prior to placement of the order.

1.6 Reimbursements for purchases made by staff will be processed upon proper authorization through the Purchasing Software.

2.1 ORDER PLACEMENT

2.2 Requestor is responsible for completing a purchase order form for all orders in excess of \$1,000. This can be processed through the Purchasing Software. Purchase orders are exempted for items such as salaries and related costs, utilities, building leases and debt service payments, other leased equipment, utilities, contracted

services, insurance, legal expenses.

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- 2.4** If there are any requirements for items to be inspected at the supplier's or the Organization's premises by the Organization or our customer, the arrangements and method of product release shall be included in the purchasing information.
- 2.4** Buyers must review their purchase orders for accuracy. The buyer submits their authorization through the Purchasing Software indicating the review was performed.
- 2.5** Orders can be placed with the vendor either by telephone, fax, internet or mail. When placing orders by telephone, the vendor contact and date of order should be noted and a confirming copy of the order sent to the vendor. Pre-approval for any purchase is always required.
- 2.6** Purchasing is responsible for communicating with those receiving the supplies, following-up on shipping, delivery, and expediting and partial shipments of ordered items. Purchasing can either telephone vendors or use a PUR102 Ex1 PURCHASE ORDER FOLLOW-UP form to verify, trace or expedite orders.
- 3.1 RECORDKEEPING AND MATCHING**
- 3.2** When Purchase Orders are issued, the Purchasing and Accounting copies will be placed in an Open File until the items are received. The Open File should be reviewed on a weekly basis to determine whether any orders need follow up.
- 3.3** Items will be received in accordance with procedure PUR103 RECEIVING AND INSPECTION. The completed vendor's packing list is kept at the site where the shipment was received.
- 3.4** For partial shipments, a note will be made in the Purchasing Software to identify the shipment as partially received. The original Purchase Order will be kept in the open file until all items are received.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/13/15	Segregation of duties and limits	Oswaldo Diaz, CFO
2	11/12/15	Inclusion of back-office provider service provider processes	Oswaldo Diaz, CFO
3	9/5/17	Revision to clarify processes and positions	
4	5/9/19	Revision to comply with LAUSD Oversight report recommendations	Nanie Montijo, CFO

5	3/29/21	Revision to update the procurement policy	Serdar Orazov, CFO
6	4/7/22	Revision to update the procurement policy	Steve Budhraj, CFO

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PUR102 Ex1 PURCHASE ORDER FOLLOW-UP

To:

Date: _____

**Please rush a reply to us by fax or
telephone on the information
requested below. Thank you.**

Our Purchase Order #: _____

From:

Dated: _____

Please Respond To Our Request As Indicated Below

with our requested date? _____

below. invoice.

Please revise

Comments or Reply: _____

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SOP # PUR103 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

TITLE: PUR103 RECEIVING AND INSPECTION

Policy: All parts, components, goods and materials will be received in an organized manner and inspected for conformance prior to stocking or use in order to provide an initial quality control inspection. Any items or shipments rejected will be properly quarantined from other inventory items until disposition.

Purpose: This procedure outlines the steps for the receiving and inspection of materials, components, or parts and the disposition of rejected items.

Scope: This procedure applies to the receipt of all purchases.

Responsibilities:

Anyone Performing the Receiving Function are responsible for receiving, inspecting materials, filing receiving documents at site, and marking purchase order as received.

Purchasing is responsible for accepting or rejecting damaged goods. Back-office provider is responsible for payment of invoices.

The Finance Department will review and authorize all rejections.

Procedure:

1.1 RECEIVING

1.2 A "receiver" is any form used to record the specific types and counts of product or materials received. Usually, the receiver is provided by the vendor and is not part of the Organization's system at all.

An example of this would be a detailed packing slip, furnished by the vendor with the shipment. The packing slip should be kept at the school site.

All incoming product or materials are to be counted and reconciled with what was originally purchased. Discrepancies must be recorded.

1.3 All incoming shipments must be examined for apparent package damage. If the shipment has apparent damage, notify Purchasing/Accounting immediately. Purchasing will decide to either accept or reject the shipment from the carrier and/or file a freight claim.

1.4 If the shipment shows no signs of damage or the Purchase Manager or School Site Principal or designee has decided to accept a damaged shipment, count the shipping pieces (i.e., packages, boxes but not the contents; see Inspection below) and confirm with the bill of lading and note any exceptions (i.e., package damage or shortages).

2.1 INSPECTION

- 2.2** At the receiving holding area, each shipment should be unpacked and all items piece counted and matched to the packing list. If a packing list is not available, complete as an example PUR103 Ex1 RECEIVING AND INSPECTION REPORT.
- 2.3** The shipment will then be inspected for conformance according to the inspection level required for each part number (see PUR103 Ex3 INVENTORY INSPECTION LEVELS). If multiple part number classes are included in the shipment, each class will be segregated and inspected accordingly.
- 2.4** Any previously undiscovered damage to individual inventory items should be noted on the inspection report and immediately followed up with the vendor.

3.1 REJECTION, DISCREPANCIES AND DISPOSITION

- 3.2** Any count discrepancies will be noted on the packing list or as an example PUR103 Ex2 RECEIVING AND INSPECTION REPORT, signed and forwarded to Purchasing. Purchasing will then follow-up with the vendor to resolve the shipping discrepancy.
- 3.3** If there is a non-conformance discrepancy, the suspect goods will be red-tagged and separated (quarantined) from other parts and immediately placed in a separate holding area for disposition.
- 3.4** If only partial goods in the shipment are of non-conformance, the accepted goods should be noted on the paperwork and stocked or placed in use per above procedure.
- 3.5** Complete as an example PUR103 Ex2 RECEIVING AND INSPECTION REPORT for any rejected parts. Accounting will review and authorize all rejections and complete Part II of the report.
- 3.6** Goods found to be in conformance or suitable for their intended use and accepted by Accounting will have the red tag removed and be returned to the receiving area or location the product is needed for use. Accounting will note on the report the justification for any accepted parts and forward the report along with the packing list to the Purchase Manager.
- Goods rejected by Accounting will continue to be quarantined and red tagged until disposed. Purchasing will determine and arrange for the appropriate disposition of rejected items (i.e., return to vendor for credit, scrap, etc.).
- 3.7** Unidentified shipments should be resolved by the Purchase Manager. Contact the Chief Financial Officer to resolve any suspicious looking packages.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Changes to responsibilities	Oswaldo Diaz, CFO

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PUR103 Ex2 RECEIVING AND INSPECTION REPORT

PART I RECEIVING

Date: _____

Vendor/Supplier/Subcontractor: _____

P.O. Or Contract No.: _____

Item No.	Description	INSPECTION Criteria	QUANTITIES			
			Ordered	Received	Inspected	Accepted Rejected

Received By: _____

PART II INSPECTION

Inspected By: _____

Sample Lot	Conformance/Discrepancies to Specifications			
	YES	NO	YES	NO
Lot Size: _____			Functional	
Sample Qty: _____	Shipping Damage		Dimensions	
Accepted: _____	Markings/Finish		Other	
Place in Stock	Attributes			
Forward to Next Operation	Date: _____	Rejected: _____	Date: _____	
	Cause for Rejection: _____			

PART III REJECTED PARTS DISPOSITION

Return to Vendor _____ Conditional Acceptance Approvals _____

Signature _____ Signature _____

Remarks: _____

Further comments may be noted on back of report or additional sheets if necessary.

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PUR103 Ex3 INVENTORY INSPECTION LEVELS

The following are generic descriptions of the type of inspections that should be performed for various classes of inventory items. These descriptions are not completely comprehensive for all the possible types of inventory that can be received and therefore, the inspector should use appropriate judgment to determine any special inspection procedures that may be necessary for unique items.

The inspection levels are intended to be cumulative in that higher level inspections will also include all lower level inspection procedures.

The percentage of the total parts inspected will be according to the part number specifications. For example, an inspection level indication of "Level II, 25" would require that 25% of the parts received in the shipment will be examined at a Level II inspection.

If defects or rejected items are discovered within a shipment and less than a 100% inspection has been performed, the receiving inspector will consult with the Quality Control Manager to determine the appropriate action for assurance of the remainder of the shipment.

- Level I: Visual inspection of the shipment or lot. Items appear reasonably to match packing list description(s). Nothing comes to the attention of the inspector as noticeable defects or as unusual and unordinary.
- Level II: Actual hands-on visual inspection of individual parts. Each part inspected will be analyzed for the quality of workmanship and construction and the appearance of any defects.
- Level III: A functional test of the part will be performed as appropriate for the item. For example, pneumatic parts should indicate function when attached to compressed air source; moving parts should rotate, slide etc.; electrical components should operate, light, etc.
- Level IV: The part will be inspected against a set performance or measurement standard as indicated in the part file. For example, structural items will be measured for compliance to drawings within specified tolerances; electrical and mechanical devices will function according to specified performance standards.

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SOP # PUR104 Revision: 4
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: PUR104 ACCOUNTS PAYABLE AND CASH DISBURSEMENTS

Policy: Internal controls are required to ensure that only valid and authorized payables are recorded and paid. Accounting procedures should be implemented to ensure the accuracy of amounts, coding of General Ledger accounts and appropriate timing of payments. All accounts payable and cash disbursements will have documented pre-approval, and the authorization limits are stated in the below Responsibilities section.

Purpose: To explain the practices for documenting, recording and issuing payments for accounts payable transactions. (Note: Payments, disbursements, and expenditures result from accounts payable transactions)

Scope: This procedure applies to all purchases including, contractors, consultants, and merchandise and non-merchandise purchases.

Responsibilities:

The Principal at each school site is responsible for reviewing and approving payments under \$10,000 in the purchase software, in accordance with the approved budget.

The Chief Financial Officer is responsible for reviewing and approving payments ~~above \$10,000~~ **up to 50,000** in accordance with the approved budget.

The Chief Executive Officer may assign the Chief Academic Officer, the Chief Operations Officer, the Chief External Officer or Regional Directors the authority to approve expenditures up to \$10,000.

The Chief Executive Officer is responsible for reviewing and approving payments over ~~\$25,000~~ **\$50,000** in accordance with the board approved budget, as well as up to **\$90,000** for non-budgeted items.

Back-office provider is responsible for payment of invoices in a timely manner.

Background: Properly recording liabilities is generally a three-step process, particularly, for merchandise purchases.

The first step is recording the liability upon receipt of merchandise, using the purchase order estimates or other documentation as a guideline. For accuracy and timeliness of data, a liability should be recorded as soon as the Organization receives the purchased items.

Consultant projects are not recognized as a liability until the invoicing from the consultant is received unless and accrual has been recorded to recognize the total estimated cost of the consultant's services.

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By necessity, this initial recording is usually an estimate or encumbrance and can be finalized when the actual invoice arrives. This is why a Purchase Order is so important for merchandise purchases. It documents the Organization's understanding of how much each item will cost, per the vendor's terms. This includes estimates for freight and any other charges.

The second step takes place when the vendor's invoice is received. At this point the actual liability is finalized, with any necessary adjustments to the item costs, freight, or other charges.

The third step involves the preparation, issuance of payment for the goods received, and subsequent filing of all paperwork for easy retrieval.

Procedure Overview:

Cash disbursements are generally made for:

1. Payments to vendors for goods and services
2. Taxes/license fees
3. Staff training and development
4. Memberships and subscriptions
5. Meeting expenses
6. Employee reimbursements
7. Marketing/promotional materials Checks

are processed throughout the week.

Requests for cash disbursements are submitted to Accounting through the purchasing software. Documentation for the purchasing software requests can be in three ways:

1. Original invoice
2. Purchase request (submitted on approved form)
3. Employee expense report or reimbursement request

All invoices must be approved by the appropriate staff prior to being submitted to accounts payable. Accounts payable will determine the account code for each invoice.

Approvals for reimbursement requests must be obtained prior to the purchase. The Organization is not obligated to reimburse requests where prior approval was not obtained; however this decision is made at the discretion of the Chief Financial

Officer.

Every employee reimbursement or purchase request must be documented in the purchasing software. Please see PUR106 Reimbursements for more details.

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Requests for payment are reviewed in the purchasing software by the Principal, Controller, or Chief Financial Officer dependent on purchase amount. The appropriate personnel:

1. Verifies expenditure and amount
2. Approves for payment if in accordance with budget
3. Provides or verifies appropriate allocation information
4. Provides date of payment taking into account cash flow projections
5. Submits to the Finance team for processing

Back-office provider processes all payments and:

1. Immediately enters them into the Accounts Payable module unless it is paid upon receipt on the same day
2. Prints checks according to allocation and payment date provided by the authorizing party
3. Submits checks, with attached backup documentation, to the Chief Financial Officer for approval and signature.
4. Stamps invoice "paid"
5. Mails checks and appropriate backup documentation
6. Files all backup documentation in the appropriate file
7. Monitors accounts payable throughout the month

Procedure:

1.1 DOCUMENTING ACCOUNTS PAYABLE

1.2 The following documents will be forwarded to Back-office provider accounts payable as a pdf batch for temporary filing and subsequent matching to form an accounts payable voucher package:

- Purchase Order from the purchasing software
- Vendor invoice
- Vendor/Consultant contract

- 1.3** Once the Back-office provider has received all of the above documents, the following steps will be performed to ensure proper authorization, validity of purchase, receipt of purchased items or services and accuracy of amounts.

The purchase order should be evaluated for proper authorization and the nature of the purchase and pricing as shown on the invoice reviewed for validity.

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- The quantities shown shipped or delivered on the invoice will be compared to the packing slip and/or receiving reports if items have been received. Any discrepancies must be followed-up and resolved prior to commencing with the disbursement process.
- Calculations on the invoice will be recomputed such as quantities received multiplied by unit price and totals.
- Purchases of items and service contracts shall not be made in small quantities (split bidding) for the purpose of circumventing the authorized approval limits assigned by the Board of Directors, or to avoid public bidding based on the policies and procedures.

2.1 RECORDING NON-MERCHANDISE PAYABLES

- 2.2** Non-merchandise expenditures like utilities, rent, insurance, taxes, repairs, professional fees, etc., are generally not recorded through the purchase order routine. However, there may be other documentation, like contracts, requisitions, and other agreements. These should be filed in the applicable vendor file as documentary support. Upon receipt of the invoice, the charges should be entered into the payable system and coded to the appropriate expense account.
- 2.3** Generally, once invoices (both merchandise and non-merchandise) have been entered, they can be filed in the respective vendor files, ordered by date. To guard against misfiling an un-entered invoice, consider stamping "entered" on each invoice when it's recorded in accounts payable. It is also helpful to note the entered date and initial entry.

3.1 PAYMENT OF ACCOUNTS PAYABLE

- 3.2** Accounts payable systems generally provide an aged accounts payable report and list the open payables within the accounting system. Open payables are reviewed by the Finance team. The Finance team should select the bills to be paid based on the funds available and a projection of cash flow or receipts over the coming week. Once complete, process the disbursements by either printing the check, electronic online bill pay, PayPal merchant, wire transfer, or ACH withdrawal for the selected bills to be paid.

Note: Accounts payable should normally be paid within 15 business days unless otherwise determined by the Chief Financial Officer.

- 3.3** Any vendor credits which are amounts owed to the Organization should be applied to amounts currently owed to the vendor when determining payment. These are

normally received in the form of a credit memo or adjusting invoice. These should be entered into the system like any other invoice and applied to the next payment being made. There is no reason to “age” a credit memo.

- 3.4 Pull all Invoices to be paid from the files and match them with the printed checks, wire transfer, electronic online bill pay, or ACH withdrawal documentation. Present the materials to the Chief Financial Officer for review and signing

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- 3.5 Immediately ensure that all printed checks, wire transfer, electronic online bill pay, or ACH withdrawal documentation are signed and approved and correctly recorded in the accounting system. Stamp the invoices “paid” to document they've been paid. Use only checks that incorporate a two stub plus check form in order to attach one stub to the paid invoice and the other to the remittance copy of the Invoice.
- 3.6 If one check or electronic online bill pay pays several Invoices then either photocopy the stub or print the electronic online bill pay screen print and attach a copy to each paid Invoice or consider attaching all paid Invoices to the one check stub or the electronic online bill pay document. File all resulting documentation according to check number sequentially in the checks paid binders.
- 3.7 Mail the checks as soon as possible once checks have been posted and "paid" by the system. It is not advisable to "hold" checks for additional days after posting. This practice usually occurs when there are insufficient cash flows. However, holding checks increases the difficulty of projecting cash flow, reduces cash balance accuracy, and causes confusion when trying to reconcile accounts payable vendor balances. None of these balances will be accurate if printed checks are held back from mailing. If cash flow is insufficient to mail the checks, then it is advisable not to post and print checks in the first place.

4.1 MANUAL CHECKS

- 4.2 The Organization does not permit the use of manual checks.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/13/15	Revision of Purchase limits	Oswaldo Diaz, CFO
2	11/12/15	Inclusion of back-office provider service provider process	Oswaldo Diaz, CFO
3	6/6/16	Policy revision	Oswaldo Diaz, CFO
4	9/5/17	Revision to clarify processes and positions	

5	2/11/2021	Revision to increase the approval limits	Serdar Orazov, CFO
6	4/7/2022	Revision to increase the approval limits	Steve Budhreja, CFO

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SOP # PUR105 Revision: 2
Effective Date: 9/5/17

Prepared by: Central Office
Approved by: BOD

Title: PUR105 PREPAID EXPENSES

Policy: It is the policy of MERF to treat payments of expenses that have a time- sensitive future benefit as prepaid expenses and to amortize these items over the corresponding time period. For purposes of this policy, prepaids are only accounted for at the end of the fiscal year and the amount that is considered to be prepaid remains at the discretion of the Chief Financial Officer.

Purpose: To ensure the proper payment and accounting of expenses that have a future benefit allocated over time.

Scope: Any transaction that is currently paid that has a value that can be amortized over a future time period.

Responsibilities:

The Chief Financial Officer is responsible for reviewing and authorizing prepaid expenses.

The Finance Department with the support of Back-office provider is responsible for processing prepaid payments and amortizing the prepaid cost of the expected future life of the prepaid asset.

Background: Prepaid expenses are very common and allow the Organization to on occasion take advantage of pre-paying for certain expenses and thus recovering discounts or ensuring that a certain expense is fully paid.

Procedure:

1.1 ACCOUNTING TREATMENT

1.2 Prepaid expenses with future benefits that expire within one year from the date of the financial statements shall be classified as current assets. Prepaid expenses that benefit future periods beyond one year from the financial statements date shall be classified as non-current assets.

2.1 PROCEDURES

2.2 As part of the account coding process performed during the processing of accounts payable at the end of the fiscal year, all incoming vendor invoices shall be reviewed for

the existence of time-sensitive future benefits. If future benefits are identified, the payment shall be coded to a prepaid expense account code.

- 2.3 The Finance Department shall maintain a schedule of all prepaid expenses. The schedule shall indicate the amount and date paid, the period covered by the prepayment, the purpose of the prepayment, and the monthly amortization. This

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schedule shall be reconciled to the general ledger balance as part of the monthly closeout process.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	11/12/15	Revision of responsibilities	Oswaldo Diaz, CFO
2	9/5/17	Revision to clarify processes and positions	

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SOP # PUR106 Revision: 3
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: PUR106 REIMBURSEMENTS

Policy: Internal controls are required to ensure that only valid and authorized reimbursements are recorded and paid. Accounting procedures should be implemented to ensure the accuracy of amounts, coding of General Ledger accounts and appropriate timing of payments.

Purpose: To explain the practices for documenting, recording and issuing payments for reimbursement transactions.

Scope: This procedure applies to all reimbursements.

Responsibilities:

The Principal at each school site is responsible for reviewing and approving payments under \$10,000 in the purchasing software, in accordance with the approved budget.

The Chief Financial Officer is responsible for reviewing and approving payments ~~above \$10,000~~ **up to 50,000** in accordance with the approved budget.

The Chief Executive Officer may assign the Chief Academic Officer, the Chief of Staff, the Chief External Officer or Regional Directors the authority to approve expenditures up to \$10,000.

The Chief Executive Officer is responsible for reviewing and approving payments over ~~\$25,000~~ **\$50,000** in accordance with the board approved budget, as well as up to ~~\$50,000~~ **\$90,000** for non-budgeted items.

Back-office provider Accounts payable is responsible for payment of reimbursements in a timely manner. A timely manner is defined as within two

weeks of submission.

Background: Properly recording reimbursements is generally a three-step process.

The first step is accurately submitting reimbursement receipts along with a proof of pre-approval.

The second step is obtaining the appropriate authorization to process payment.

The step involves the preparation, issuance of reimbursement payment in a timely manner, and subsequent filing of all paperwork for easy retrieval.

Procedure Overview:

Reimbursements are generally made for:

1. Travel and conferences
2. Mileage

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3. Meals
4. School/classroom supplies
5. Allowable academic expenses
6. Student awards
7. Other expenses

Reimbursement checks are processed on cycle or sooner.

All reimbursement requests must be approved by the authorized staff prior to being submitted to accounts payable. Accounts payable will review the account code for each invoice.

Every employee reimbursement or purchase request must be documented in the financial software with evidence of pre-authorization, receipts, nature of business, program allocation, and funding source:

Travel and Conferences - an itemized receipt from the hotel detailing all charges, the person(s) for whom the lodging was provided, and the specific business purpose. This includes itemized receipts for parking, tolls and bridges, car rentals, taxis, and conference receipts not to exceed the current Government Services Administration (GSA) per diem rates. Current rates are available at www.gsa.gov/perdiem. (See G&A103, Travel and Entertainment policy for more detailed information.)

Car Rentals – Advanced approvals are required. The employee may make their own car rental arrangements. Vehicle selection will be based upon the most cost-effective class that satisfies requirements for the employee(s) and any demonstration equipment. Supplemental auto insurance coverage offered by car rental agencies must be purchased and will be reimbursed.

Mileage/Personal Vehicles - An employee required to use their own automobile for business will be reimbursed in accordance with the current IRS mileage reimbursement rate. The employee must provide on the expense report, documentation including dates, miles traveled and purpose of each trip.

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The Organization assumes no responsibility for personal automobiles used for business. Further, any parking or speeding violation is the sole responsibility of the employee.

Meals and Entertainment - a receipt must be provided showing the cost of food, beverage, and gratuities, including the names of every person for whom food or beverage was provided, and the specific business purpose. Entertainment expenses are disallowed. Meals are reimbursed based on actual receipt amounts not to exceed the following; Breakfast: \$17.00, Lunch: \$18.00, Dinner: \$34.00 with no reimbursement for incidental expenses.

Meal and Entertainment tips are limited to 15% (unless automatically assessed by the eating establishment) of the pre-tax meal total cost and any tip that is in excess of the pre-tax meal total cost will not be reimbursed. For example, a meal that costs \$10 may have an 8% sales tax bringing the total meal price before tip to \$10.80. Figure the tip on the \$10 amount at 15% or \$1.50 and that amount of tip or less is reimbursable. If you tipped more than \$1.50, that difference is not reimbursable. You are always allowed to tip less than 15% should you choose to do so.

School/Classroom Supplies, Allowable Academic Expenses, and Student Awards – these expenditures are subject to the approval of the Principal. Gifts of any kind are never allowed. Student awards may only be paid from non-ADA and unrestricted sources. In other words, student awards may be paid from unrestricted fundraising or from other unrestricted sources of income, subject to approval of the Principal and/or Home Office.

Other Expenditures - a receipt from the vendor detailing all goods or services purchased (including the class of service for transportation) and the specific business purpose.

Non-Reimbursable Expenses - Some expenses are not considered valid business expenses by the Organization, yet may be incurred for the convenience of the traveling individual. Since these are not expenses for the business then they are not reimbursable. (The following can be used as a guide of expenses, which are not reimbursable)

Examples include:

- Airline or travel trip interruption insurance
- Airline or travel lounge clubs
- Shoe shine or Dry-cleaning (except for extended travel beyond 5 days)
- Movies or personal entertainment
- Books, magazines or newspapers
- Theft or loss of personal property
- Doctor bills, prescriptions, or other medical services

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- Parking tickets, traffic tickets or Car towing if illegally parked
- Health club memberships
- Baby sitter or Pet care fees
- Barbers and Hairdressers

Requests for reimbursement payments are reviewed in the financial software by the Principal, Account Analysts, Chief Financial Officer, or Chief Executive Officer, dependent on purchase amount. The appropriate personnel:

1. Verifies and matches expenditure and amount
2. Approves for payment if in accordance with budget
3. Provides or verifies appropriate allocation information
4. Provides date of payment taking into account cash flow projections
5. Submits to the Finance team for processing Accounts

Back Office Provider processes all payments and:

1. Immediately enters them into the Accounts Payable module.
2. Prints checks according to allocation and payment date provided by the approving party
3. Submits checks, with attached backup documentation, to Chief Financial Officer for approval and signature
4. Stamps invoice “paid”
5. Mails checks and appropriate backup documentation

6. Files all backup documentation in the appropriate file

7. Monitors accounts payable throughout the month

Procedure:

1.0 DOCUMENTING REIMBURSEMENTS

All business reimbursement expenditures incurred by employees of the Organization are reimbursed through the Financial system software. All reimbursement receipts must be submitted monthly and any receipt (except tuition reimbursement) that is older than ~~60~~ 90 days will not be reimbursed. Employee may submit written justification for the late submission and will be processed at the discretion of the Chief Financial Officer.

All required original receipts for items charged must accompany all reimbursement documentation as well as uploaded into the financial system for approval and reimbursement payment process.

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In order to expedite reimbursement, the employee should ensure that the report is completed properly, required documentation is attached, proper authorization is obtained, and any unusual items properly explained and documented. Any questions regarding completion of the report should be directed to the employee's supervisor or the Finance Team.

Revision History:

Revision	Date	Description of changes	Requested By
0	2/14/13	Initial Release	
1	2/13/15	Amount limit changes. Mileage reimbursement rate.	Oswaldo Diaz, CFO
2	11/12/15	Inclusion of back office service provider and amount limit changes.	Oswaldo Diaz, CFO
3	9/5/17	Revision to clarify processes and positions	
4	9/12/19	Revision	Nanie Montijo, CFO
5	2/11/2021	Revision to increase the approval limits	Serdar Orazov, CFO
6	4/7/22	Revision to update the approval limits	Steve Budhreja, CFO



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SOP # PUR107 Revision: 2
Effective Date: 4/7/22

Prepared by: Central Office
Approved by: BOD

Title: PUR107 BIDDING REQUIREMENTS

Policy: To ensure the establishment of bidding requirements relating to multi-year service contracts, and to maintain the internal controls of the selection process.

Purpose: To provide the methods for determining a bidding process, documentation requirements, and award of contracts.

Scope: **This procedure applies to all vendors in order to comply with all Federal Uniform Guidance protocols.**

Responsibilities:

Purchasing Agent or School Principal is responsible for providing a summary and justification related to the potential proposal.

Selection Committee is responsible for the review and recommendation of all contracts over ~~\$25,000~~ **90,000**

Chief Executive Officer and/or Chief Financial Officer is/are responsible for the examination of the bidding and selection process of all contracts above ~~\$25,000~~ **90,000**

Board of Directors are responsible for the approval of all bidding contracts above ~~\$50,000~~ **90,000**

Procedure:

1.1 BIDDING REQUIREMENTS AND PROCESS

1.2 New service contracts in excess of ~~\$50,000~~ **\$90,000 per site** shall be formally bid in

accordance with the following:

- Request for Proposals (RFP): RFP requirements should include contract purpose, background, description of service, general information, time requirements, proposal requirements, and evaluation process.
- Public Notice: RFP will be posted in the Organization’s website.
- Prospective Vendors: Selection Committee shall maintain a list of prospective vendors for the various categories of products and services purchased by the organization. All schools or departments should refer prospective vendors to the purchasing department for inclusion in the bidder file.
- Pending Bid File: A file shall be maintained by the selection committee of all invitations to bid currently pending.
- Evaluation: Evaluation of services and vendors will be in accordance with the RFP specifications and policy PUR101 vendor selection.

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- Bidder Files: Bidder files shall be maintained retaining the bids, bid comparison sheets, other submittals, and rationale in award. These bids shall be made available for the public upon request for a period of ninety (90) days after which time they will be archived for two (2) years.
- Bidding of contracts shall not be made in small quantities (split bidding) for the purpose of circumventing the authorized approval limits assigned by the Board of Directors, or to avoid public bidding based on the policies and procedures.
- The RFP requirement doesn’t apply to renewal and/or extension of the existing service contracts.

Vendor Selection Requirements			
	Less than \$5,000	Between \$5,000 and \$50,000	Greater than \$50,000 90,000
Bid process required?	No	Quotes or estimates	RFP
Acceptable forms of price comparison	N/A	Email, published catalogs, written	Written only
Minimum number of bids required	0	3	3

Submit bid documentation to the Procurement Office?	No	Yes	Yes
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2.1 NONCOMPETITIVE NEGOTIATIONS

2.2 Noncompetitive negotiations may be used for procurements in excess of when bidding or competitive negotiations are not feasible. MPS may purchase goods and services through non-competitive negotiations when it is determined in writing by the Chief Executive Officer that competitive negotiation or bidding is not feasible and that:

- An emergency exists which will cause public harm as a result of the delay caused by following competitive purchasing procedures, or
- The product or service can be obtained only from one source, or
- The contract is for the purchase of perishable items purchased on a weekly or more frequent basis, or
- Only one satisfactory proposal is received through RFP, or
- The charter authorizer has authorized the particular type of noncompetitive negotiation.

3.0 STANDARDS OF CONDUCT

The following Standards of Conduct shall govern the performance, behavior and actions of MPS including, employees, officers, directors, volunteers and agents, who are engaged in any aspect of procurement, including – but not limited to – purchasing goods and services; awarding contracts and grants; or the administration and supervision of contracts.


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As representatives of MPS, all employees, officers, directors, volunteers and agents are expected to conduct themselves in a professional and ethical manner, maintaining high standards of integrity and the use of good judgment. Employees are expected to be principled in their business interactions and act in good faith with individuals both inside and outside MPS.

3.3 Conflict of Interest

- 3.3.1 No employee, officer, director, volunteer or agent of the MPS shall participate in the selection, award or administration of a bid or contract supported by federal funds if a conflict of interest is real or apparent to a reasonable person.
- 3.3.2 Conflicts of interest may arise when any employee, officer,  director, volunteer or agent of the MPS has a financial, family or any other beneficial interest in the vendor firm selected or considered for an award.
- 3.3.3 No employee, officer, director, volunteer or agent of the MPS shall do business with, award contracts to, or show favoritism toward a member of his/her immediate family, spouse’s family or to any company, vendor or concern who either employs or has any

relationship to a family member; or award a contract or bid which violates the spirit or intent of Federal, State and local procurement laws and policies established to maximize free and open competition among qualified vendors.

3.3.4 MPS's employees, officers, directors, volunteers or agents shall neither solicit nor accept gratuities, gifts, consulting fees, trips, favors or anything having a monetary value in excess of fifty dollars (\$50) from a vendor, potential vendor, or from the family or employees of a vendor, potential vendor or bidder; or from any party to a sub-agreement or ancillary contract.

4.0 ACCEPTANCE OF GRATUITIES

MPS's employees, officers, directors, volunteers or agents shall neither solicit nor accept gratuities, gifts, consulting fees, trips, favors or anything having a monetary value from a vendor, potential vendor, or from the family or employees of a vendor, potential vendor or bidder; or from any party to a sub-agreement or ancillary contract.

5.0 DISCIPLINARY ACTIONS

Any MPS member, employee or designated agent of MPS who knowingly and deliberately violates the provisions of this code will be open to civil suit without the legal protection of MPS. Furthermore, such a violation of these procurement standards is grounds for dismissal by MPS as an employee, officer, director, volunteer or agent; or other such sanctions as available under the law.

Any contractor or potential contractor who knowingly and deliberately violates the provisions of these procurement standards will be barred from future transactions with MPS.

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Revision History:

Revision	Date	Description of changes	Requested By
0	2/16/15	Initial Release	Oswaldo Diaz, CFO
1	3/10/16	Policy Revision	Oswaldo Diaz, CFO
2	6/06/16	Policy Revision	Oswaldo Diaz, CFO
3	2/11/21	Policy Revision to update the limits	Serdar Orazov, CFO
4	4/7/22	Policy Revision to update the limits	Steve Budhreja, CFO

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