



Board Agenda Item #	V A – Discussion Item
Date:	June 29, 2020
To:	Magnolia Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	David Yilmaz, Chief Accountability Officer
RE:	MPS Schools Annual Authorizer Oversight Reports

Proposed Board Recommendation

Information/Discussion Item

Background

*Oversight Visits Overview*

Per the Education Code, charter authorizers need to conduct at least one annual oversight visit to their authorized schools. During an oversight visit authorizers meet with the school leadership, visit classrooms, conduct interviews with staff, parents, and students, check student and staff records, interview some staff (for segregation of duties, etc.), and review a list of documents that our schools provide in physical and electronic binders or folders. As a sample please see **attached** LAUSD annual performance-based binder prep guide 2019-20. The Home Office supports the schools in preparation for the oversight visits through mock visits, document preparation and review, and attendance to the oversight visits.

*2019-20 Oversight Visits*

All MPS schools have been visited by their respective authorizers. Following are the oversight visit details for 2019-20:

School	Authorizer	Visited?	Dates/Notes
MSA-1	LACOE	Yes	Various Zoom meetings during May
MSA-2	LACOE	Yes	Various Zoom meetings during May
MSA-3	LACOE	Yes	Various Zoom meetings during May
MSA-4	LAUSD	Yes	Zoom meeting on 4/28/20
MSA-5	LACOE	Yes	Various Zoom meetings during May
MSA-6	LAUSD	Yes	2/20/20
MSA-7	LAUSD	Yes	2/19/20
MSA-Bell	LAUSD	Yes	2/27/20

MSA-San Diego	SDUSD	Yes	Zoom meeting on 4/14/20
MSA-Santa Ana	SBE	Yes	2/5-6/20

*Oversight Visit Reports*

Authorizers typically provide the school with a report after their visit to delineate the school’s areas of strength and areas for improvement as well as areas of compliance and non-compliance, if applicable. The school leadership and the Home Office review those reports very carefully for continuous improvement of our schools.

LAUSD:

In their report LAUSD provides a rating to the schools (out of 4) for the following areas: Governance, Student Achievement and Educational Performance, Organizational Management, Programs, and Operations, and Fiscal Operations. For 2019-20, MSA-6 is the only LAUSD school that has received an oversight report to date. The school received a rating of “4” in both Governance and Operations and a rating of “3” in Student Achievement and Fiscal Operations. The following are ratings our LAUSD authorized schools received in 2018-19:

<u>Authorizer Oversight Visit Reports</u>	Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
<b>2019-20</b>				
MSA-4				
MSA-6	4	3	4	3
MSA-7				
MSA-BELL				
<b>2018-19</b>				
MSA-4	4	3	3	4
MSA-6	4	4	4	4
MSA-7	4	3	4	4
MSA-BELL	4	3	3	4

CDE:

Please find attached the letter we received from the CDE with the subject, “Summary of Annual Site Visit for Magnolia Science Academy – Santa Ana conducted on February 5 and 6, 2020.” The letter states that the school was in compliance with the charter petition and the MOU between the California State Board of Education and MSA-SA.

SDUSD:

We have not received a letter or report from SDUSD yet, but the overall visit has been successful, with no findings for non-compliance.

LACOE:

We have not received 2019-20 oversight visit reports for MSA-1, 2, 3, and 5 from LACOE. LACOE typically provides three separate reports for each school in the following areas:

- Governance Review
- Fiscal Annual Report
- Instructional Program Overview

This year the LACOE visits were virtually conducted over Zoom. The schools provided LACOE with the links to sample online synchronous class sessions and staff meetings.

*Summary / Recommendations from Oversight Visit Reports*

Besides the letter from the CDE, the only report we have been provided by our authorizers is the report for MSA-6. We would like to share the following summary and recommendations from MSA-6’s report.

GOVERNANCE

Summary of School Performance:

GOVERNANCE	RATING*
Summary of School Performance	4
<u>Areas of Demonstrated Strength and/or Progress</u>	
<p><b>G2:</b> The Governing Board continues to comply with all material provisions of the Brown Act, including all aspects of SB 126.</p> <p><b>G4:</b> The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements as evidenced by the ESSA Grids and Board minutes.</p> <ul style="list-style-type: none"> <li>• As evidenced in Board minutes, the Board approved to hire an Intervention and Instructional Coach at MSA Bell; Memorandum of Understanding with CSULA and the University of Redlands to partner with MSA Bell in an education internship program from July 2019-June 2021; add a part time Resource Specialist Program Teacher to MSA 4 due to increase of students with disabilities; and added a Computer Teacher to MSA 7.</li> </ul> <p><b>G5:</b> The Governing Board monitors school performance and other internal data to inform decision-making.</p> <ul style="list-style-type: none"> <li>• As evidenced in Board agendas and minutes, there has been academic updates given to the Board via school leaders, as well as Magnolia Public Schools (MPS) Home Office staff. Academic updates include providing the Board with an overview of the CA Dashboard Indicators and academic performance of all MPS schools,</li> </ul>	
<u>Areas Noted for Further Growth and/or Improvement</u>	
None	
<u>Corrective Action Required</u>	
None noted that require immediate action to remedy concerns indicated in this report.	
Notes: None	

STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE

Summary of School Performance:

STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE Summary of School Performance	RATING <sup>+</sup> 3
<p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO                      If yes, what is the school's identification? (See additional information within "Notes" section below)  <input type="checkbox"/> Comprehensive Support and Improvement (CSI)  <input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u>                      A3: The schoolwide percentage of students who Met and Exceeded Standards in 6<sup>th</sup> – 8<sup>th</sup> Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median (RSM).  <ul style="list-style-type: none"> <li>Per CDE and a data set provided by LAUSD Data and Accountability, 45.63% of MSA 6's students Met and Exceeded Standards on the SBAC in ELA, compared to the RSM of 30.61%.</li> </ul>                     A4: The schoolwide percentage of students who Met and Exceeded Standards in 6<sup>th</sup> – 8<sup>th</sup> Grade on the SBAC in Math is at a rate higher than the RSM.  <ul style="list-style-type: none"> <li>Per CDE and a data set provided by LAUSD Data and Accountability, 38.36% of MSA 6's students Met and Exceeded Standards on the SBAC in Math, compared to the Resident Schools Median of 21.13%.</li> </ul>                     A5: The school reclassifies English Learners at a rate higher than the RSM.  <ul style="list-style-type: none"> <li>Per the CDE Reclassification Report, 33.3% of MSA 6's English Learners reclassified, compared to the RSM at 25.0%.</li> </ul>                     A6: The school's percentage of "At Risk" English Learners is at rate lower than the RSM.  <ul style="list-style-type: none"> <li>Per the CDE's "At-Risk" by Grade report, MSA 6 is at 0%, compared to the RSM at 0.9%.</li> </ul>                     A7: The school's percentage of LTELs is at a rate similar to the RSM.  <ul style="list-style-type: none"> <li>Per the CDE's Long-Term English Learners (LTEL) by Grade report, MSA 6 is at 28.6%, compared to the RSM at 28.0%</li> </ul> </p>	
<p><u>Areas Noted for Further Growth and/or Improvement</u>                      A1: None of the school's numerically significant subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019.  <ul style="list-style-type: none"> <li>Per CDE, MSA 6 has four numerically significant subgroups (English Learners, Latino, Socioeconomically Disadvantaged, and Students with Disabilities). Four out of four declined in ELA. Although not numerically significant, African American students (14), demonstrated growth by 8.33%.</li> </ul>                     A2: Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019.  <ul style="list-style-type: none"> <li>English Learners and Students with Disabilities demonstrated declines by 7.49% and 7.79%, respectively. However, Latino and Socioeconomically Disadvantaged students demonstrated growth by 0.14% and 2.85%, respectively.</li> </ul>                     NOTE: See "O4: MEETING THE NEEDS OF ALL STUDENTS..." for more information concerning both A1 and A2.</p>	

Corrective Action Required

None noted that require immediate action to remedy concerns indicated in this report.

Notes:

Reclassification Criteria:

- Overall score of 4 on the ELPAC
- Performance level of Basic on the NWEA MAP Reading assessment OR a minimum score of "Nearly Met" in ELA on the SBAC
- Grade "C" or above in ELA
- Parent Consultation

*\*NOTE: A charter school cannot receive a rating in this category greater than a 2 if the school has not met the minimum statutory renewal criteria which requires clear and convincing evidence that the academic performance of the charter school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the schools in the school district in which the charter school is located, taking into account the composition of the pupil population that is served at the charter school (e.g. Resident Schools) as measured in indicators A3 and A4.*

ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS

Summary of School Performance:

ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	4
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p><b>O2:</b> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens.</p> <ul style="list-style-type: none"> <li>▪ Per evidence in Binder #3, school is compliant with AB 1871 (providing needy students with one adequate free or reduced priced meal each day) and AB 2009 (Automated External Defibrillator)</li> </ul> <p><b>O4:</b> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis.</p> <ul style="list-style-type: none"> <li>▪ Per school leadership, there has been an increase in English Learners, Students with Disabilities, and Socioeconomically Disadvantage students for the past three years. Additionally, school leadership shared that most of English Learners are dually identified as also being a student with a disability. The main focus for instruction and intervention for the 2019-2020 school year has been to increase support for English Learners and Students with Disabilities. In addition to the intervention opportunities already in existence (e.g. Power Math &amp; English classes, after school tutoring, and Saturday school), the school has implemented the following:             <ul style="list-style-type: none"> <li>○ During the first period of the day (SSR), English Learners receive Designated ELD by two English teachers 40 minutes per day.</li> <li>○ Students with Disabilities go to the Learning Center every day to receive support for the Education Specialist.</li> <li>○ All teachers were trained by the new ELA/ELD Program Coordinator during the summer in-services.</li> <li>○ All teachers were trained by the Director of Special Education and Support Services in the area of special education, Universal Design for Learning and Restorative Justice</li> <li>○ New this year: students will receive the MAP testing three times this year, instead of two, in an effort to monitor students' success and adjust teaching as necessary</li> <li>○ School administration identifies students who are struggling and meet with them on a one-to-one basis.</li> <li>○ More technology is being utilized like NextGen Math and ConnectEd to improve Math performance</li> <li>○ Consistency with an emphasis on writing, reading and the use of the MyOn program (reading program/digital library)</li> <li>○ Weekly staff meetings to discuss the academic progress of students and to reflect on current practices. Education Specialist gives teachers weekly updates about Students with Disabilities and shares best practices utilizing accommodations for academic support.</li> <li>○ Teachers are reading <i>The Language-Rich Classroom</i>, by Himmele to enrich them with different strategies on engaging English Learners.</li> <li>○ School is including ELPAC training and practice tests during Designated ELD instruction.</li> </ul> </li> </ul> <p><b>O7:</b> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights.</p> <ul style="list-style-type: none"> <li>▪ School is compliant with AB 2291 (provides procedures for preventing bullying, including cyberbullying)</li> <li>▪ Per school leadership, as of the day of the Performance Based Oversight visit, the school has 0% suspensions.</li> </ul> <p><b>O9:</b> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns.</p> <ul style="list-style-type: none"> <li>▪ Per school leadership, stakeholders receive a Newsletter on a weekly basis.</li> </ul>	

<ul style="list-style-type: none"> <li>▪ School is compliant with SB 1104 (evidence of informing parents/guardians of human trafficking prevention resources on its website)</li> </ul> <p><b>O10:</b> The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website.</p> <ul style="list-style-type: none"> <li>▪ School is compliant with AB 2022 (evidence of notification requirements to pupils and parents on how to initiate access to pupil mental health services)</li> </ul>
<p><u>Areas Noted for Further Growth and/or Improvement</u></p> <ul style="list-style-type: none"> <li>▪ In an effort to increase academic performance and SBAC scores, SEE O4 above</li> <li>▪ Per school leadership, another great need is with Chronic Absenteeism for homeless students and students with disabilities.             <ul style="list-style-type: none"> <li>○ "This school year we are monitoring the absent students very closely and working with a SART team..."</li> <li>○ New this year is the utilization of Parent Square, a communication tool to help communicate with all families via vest message, voicemail, and email.</li> </ul> </li> </ul> <p><u>Corrective Action Required</u></p> <p>None noted that require immediate action to remedy concerns indicated in this report.</p>

Notes:  
None

*\*NOTE: A charter school shall receive a rating of 1 in this category for any of the following reasons: (1) Failed to have Health, Safety, and Emergency Plan in place; (2) Failed to conduct child abuse mandated reporter training in accordance with AB 1432; (3) Failed to complete criminal background clearances for all new staff and sole proprietor (as defined on the ESSA Grid) prior to employment; or (4) Failed to obtain DOJ clearance certification, as appropriate, from a vendor. A charter school cannot receive a rating in this category greater than 2 if any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.*

FISCAL OPERATIONS

Summary of School Performance:

FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p><b>Other circumstances and information could influence the rating and are noted in this evaluation.</b></p> <p>MSA 6's fiscal condition is positive and has been upward trending since the 2015-2016 fiscal year. According to the 2018-2019 independent audit report, the school had positive net assets of \$1,814,289 and net income of \$210,391. The 2019-2020 Second Interim projects positive net assets of \$1,623,055 and a net loss of <b>(\$191,234)</b>.</p> <p>According to MSA 6's independent audit report dated June 30, 2019, MSA 6 is one of 10 schools operated by Magnolia Educational &amp; Research Foundation. MERF currently has four schools that are authorized by the Los Angeles Unified School District (LAUSD). MERF's fiscal condition is strong. MERF and its charter schools reported positive net assets of \$28,113,703 and net income of \$1,202,741. MERF, without its charter schools, reported positive net assets of \$1,623,663 and net income of \$829,702. According to MERF, during 2018-2019, MSA 6 paid management fees of \$43,658 to MERF for administrative services such as: finance and accounting, human resources and employee relations, Home Office management, information technology, operational compliance support, growth and facilities management, parent and community engagement, and programmatic compliance. These management fees were calculated based on a variable rate driven by the Average Daily Attendance (ADA) for each of the MERF charter schools.</p>	3

<p><b>Areas of Demonstrated Strength and/or Progress:</b></p> <p>1. The school's fiscal condition is positive.</p>					
	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Second Interim)
Net Assets	\$957,265	\$1,258,921	\$1,603,898	\$1,814,289	\$1,623,055
Net Income/Loss	\$482,708	\$301,656	\$344,977	\$210,391	<b>(\$191,234)*</b>
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
<p>*See Item 27 in the Notes section for further details.</p>					

<p><b>Areas Noted for Further Growth and/or Improvement:</b></p> <p>Through conducting fiscal oversight and analyzing the data below, the CSD requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the four MERF charter schools that are currently authorized by LAUSD. The CSD reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with the MERF Public Schools Fiscal Policies &amp; Procedures. Any areas noted for further growth and/or improvement relating to MERF's and its charter schools' overall compliance to the aforementioned manual are indicated within each charter school's Annual Performance-Based Oversight Visit Report, which may or may not have been experienced by the specific MERF school named above. Lastly, any exceptions related to the fiscal condition and/or the segregation of duties reviews are school-specific and reviewed separately for each MERF charter school.</p> <p>1. <b>Late Fees:</b> Based on the CSD's review of the school's credit card statements and supporting documentation for the period from May 2019 through October 2019, the CSD noted 13 credit card statements that referenced late fees totaling \$1,470.94 in the aggregate. These late fees are summarized below.</p>					
---	--	--	--	--	--

Item #	School	Month	Transaction Date	Amount	Transaction Description
1	MSA 4	May 2019	5/1/2019	\$292.56	Delinquent Charges
2	MSA 4	July 2019	7/1/2019	\$92.96	Delinquent Charges
3	MSA 4	August 2019	8/1/2019	\$77.93	Delinquent Charges
4	MSA 4	October 2019	10/1/2019	\$48.75	Delinquent Charges
5	MSA 6	August 2019	8/1/2019	\$96.72	Delinquent Charges
6	MSA 6	September 2019	9/1/2019	\$244.01	Delinquent Charges
7	MSA 7	May 2019	5/1/2019	\$71.51	Delinquent Charges
8	MSA 7	July 2019	7/1/2019	\$149.64	Delinquent Charges
9	MSA 7	August 2019	8/1/2019	\$220.88	Delinquent Charges
10	MSA Bell	July 2019	7/1/2019	\$37.44	Delinquent Charges
11	MSA Bell	August 2019	8/1/2019	\$31.28	Delinquent Charges
12	MSA Bell	September 2019	9/12/2019	\$29.00	Delinquent Charges
13	MSA Bell	October 2019	10/1/2019	\$78.26	Delinquent Charges
			<b>TOTAL</b>	<b>\$1,470.94</b>	

In response to the CSD's observations above, MERF's Chief Financial Officer (CFO) stated that, during Fiscal Year 2018-2019, the organization implemented a new financial system. The CSD was further advised that, while the organization's 2018-2019 accounts payable were in the process of being closed (at year-end), some delinquency charges were incurred during its reconciliation process. Additionally, MERF's CFO explained that, during Fiscal Year 2019-2020, the organization discovered the 2018-2019 delinquency charges and subsequently implemented a new American Express reconciliation process, whereby statement reconciliations are processed within 10 days of receipt. Finally, MERF's CFO shared that, to avoid additional late charges in the future, MERF has established automatic payments and has developed a system to immediately review and reconcile the organization's credit card statements.

**2. Late Payments to Vendors:**

Based on the CSD's review of the school's check register for the period spanning from October 1, 2018 through October 1, 2019, a sample of 46 checks and 12 bank transactions were selected for further review. The CSD noted that 3 out of the 46 checks referenced invoices that were paid late (including one that referenced late fees and interest charges). The items in question are summarized below.

Item #	Check #	Check Issuance Date	Invoice Due Date	Payee	Check Amount	Transaction Description
1	90154	3/4/2019	6/29/2018	CoolSIS Technologies, Inc.	\$1,342.00	"CoolSIS Tech June not paid Services."
2	73602	6/17/2019	4/1/2019	Eco Home Safe, Inc.	\$175.00	"Monthly Pest Services April."
3	DDP-00000153	8/16/2019	8/1/2019	Pitney Bowes (Purchase power)	\$451.39	"Late fees \$39.99; Finance charges \$9.68."

In response to the CSD's observations above, MERF's CFO explained that two of the items noted above (i.e., Item # 1 and Item # 2) were paid late as a result of vendors not providing the invoices on time. With respect to Item # 3, the CSD was advised that automatic payments have been established for this vendor, to ensure that all future payments to this vendor are timely.

The CSD recommends that the school implement procedures to track all recurring and non-recurring invoices and billing statements and ensure that all vendors and credit card balances are paid timely, to prevent the school from incurring additional late fees and/or interest charges in the future.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD's recommendations and the school's action plans concerning the above-noted findings and observations should be discussed at MERF's next governing board meeting, but, in any event, no later than 90 days following the school's receipt of this report. After the school's next board meeting, it is the school's responsibility to provide the CSD with its approved board meeting minutes regarding its action plans/steps, and/or proof of implementation of the mitigating actions taken by the school. The CSD will continue to monitor these issues through oversight.

**Progress on LAUSD Board of Education and/or MOU Benchmarks related to FISCAL OPERATIONS (if applicable):**

As part of its renewal petition approved by the LAUSD Board of Education on October 23, 2018, during the 2019-2024 charter term, MSA 6 must meet the fiscal benchmark below in order to address the school's fiscal operations concerns.

The school shall provide a written status report to the Charter Schools Division no later than December 15 of each year of the charter term demonstrating its progress related to the following:

1. MERF's continuous improvement in the school's fiscal management and operations, based on the recommendations made by School Services of California.

To date, MSA 6 has complied with the benchmark cited above. The CSD will continue to monitor the school's progress and compliance with the fiscal benchmark above through the remainder of the school's charter term.

**Note:**

The report includes the following comment from LAUSD for Fiscal Operations:

“The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD's recommendations and the school's action plans concerning the above-noted findings and observations should be discussed at MERF's next governing board meeting, but, in any event, no later than 90 days following the school's receipt of this report. After the school's next board meeting, it is the school's responsibility to provide the CSD with its approved board meeting minutes regarding its action plans/steps, and/or proof of implementation of the mitigating actions taken by the school. The CSD will continue to monitor these issues through oversight.”

MPS received this report on June 11. We will provide the board with an action plan with steps, implement our action plan, and provide proof of implementation to the LAUSD CSD.

The Home Office will continue to provide the board with any oversight report and feedback from the authorizer visits.

**Budget Implications**

N/A

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

N/A

**Name of Staff Originator:**

David Yilmaz, Chief Accountability Officer

**Exhibits (Attachments):**

- MSA-SA Site Visit Letter No Concerns
- Attachment A - Annual Performance-Based Oversight Visit Preparation Guide 2019-2020
- Oversight Visit Report for MSA-6





# LOS ANGELES UNIFIED SCHOOL DISTRICT CHARTER SCHOOLS DIVISION

333 South Beaudry Avenue, 20<sup>th</sup> Floor, Los Angeles, CA 90017  
Office: (213) 241-0399 ♦ Prop. 39: (213) 241-5130 ♦ Fax: (213) 241-2054

**AUSTIN BEUTNER**  
*Superintendent*

**ALISON YOSHIMOTO-TOWERY**  
*Interim Chief Academic Officer*

**JOSÉ COLE-GUTIÉRREZ**  
*Director, Charter Schools Division*

## ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT PREPARATION GUIDE 2019-2020

### OVERVIEW

As part of our continuing efforts to provide performance-based oversight and to support the success of all students enrolled in LAUSD-authorized charter schools, the Charter Schools Division (CSD) observes and monitors each school's performance in view of state and federal law, District policy, and the school's charter. You can access District Policies Applicable to ALL LAUSD-Authorized Independent Charter Schools at <https://achieve.lausd.net/Page/1823>. In addition, you can access supplemental information on the CSD website at <https://achieve.lausd.net/Page/1816>. CSD staff members often make a number of informal visits to their assigned schools and may attend governing board meetings and admission lotteries throughout the academic year as part of year-round oversight. In accordance with California Education Code § 47604.32, the CSD annually conducts at least one formal school site visit - the "annual performance-based oversight visit" - that focuses on charter school performance in the following four categories:

<b>Category I:</b>	<b>Governance</b>
<b>Category II:</b>	<b>Student Achievement and Educational Performance</b>
<b>Category III:</b>	<b>Organizational Management, Programs, and Operations</b>
<b>Category IV:</b>	<b>Fiscal Operations</b>

The CSD provides the following guidance to assist charter schools in preparing for this year's CSD annual performance-based oversight visit. We hope this information will clearly communicate our expectations and thus enable each school to make sufficient advanced preparation to ensure a smooth, productive, and efficient visit experience for all. Prior to the annual oversight visit, your CSD assigned administrator, in consultation with the charter school's leadership, and the CSD Fiscal Team member assigned to the school, will determine and communicate the specific activities and schedule for the visit.

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

**LOGISTICS**

In order to facilitate a productive and efficient review process, the CSD requests each charter school to provide appropriate space(s) for the following visit activities:

- Small confidential work area containing a table and chairs with at least one nearby electrical outlet and **internet access**, for the use of the CSD visiting team to conduct document review and other team activities
- Room or other space in which the CSD team and the school leadership team can gather together for the Morning Meeting and visit debriefing
- The school is notified in advance if the visit will include stakeholder focus group interviews, a room or other space appropriate for conducting these confidential interviews.

Note: A single room or space may be appropriate, of course, to serve multiple purposes.

Please provide the following items in a separate folder for the CSD visiting team:

- Visit Schedule
- Master Schedule
- Staff Roster
- Site Map
- Bell Schedule
- School Contact Information

The CSD annual performance-based oversight visit typically encompasses the following activities, which provide opportunities to gather evidence (information and data) related to the performance indicators as well as to share “educator-to-educator” information and insights (required activities are in ***bold/italics***):

1. Interview/Discussion
  - a. ***“Morning Meeting”*** with school leadership, which includes reflection and discussion of school academic achievement data and other key aspects of school performance
  - b. ***Interview/discussions with organization and school-site leadership*** on specific topics (e.g. special education) and as needed to clarify and/or augment information already gathered
  - c. ***Interviews of stakeholder groups*** (students, parents, staff) as determined by CSD staff
  - d. ***Debriefing of visit with school leadership***
2. Observation
  - a. ***Classroom observation***
  - b. ***Site observation***
3. Document Review
  - a. ***Review of documentation provided by school*** (see guidance below)
  - b. ***Request and review of additional documentation***
4. Fiscal Review<sup>1</sup>

See section below on preparation for fiscal review

**PREPARATION FOR INTERVIEW/DISCUSSION**

---

<sup>1</sup> Note: The fiscal review component of the annual oversight visit may take place on a different day and/or at a different location (e.g. charter operator offices). The school/charter operator is notified directly by the Fiscal Team, usually four weeks in advance of the scheduled annual performance-based oversight visit.

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

In the weeks prior to the scheduled visit, your CSD administrator will provide school-specific guiding questions that focus on performance in one or more of the four assessment categories. The guiding questions and school's responses lead the discussion between the school's leadership team and CSD staff during the Morning Meeting need to

**PREPARATION FOR DOCUMENT REVIEW**

As an integral part of every annual oversight visit, the CSD reviews documentation in order to gather information and evidence regarding the school's performance in the four categories set forth above. The charter school has the option of using the existing Dropbox account for the oversight binders. If the charter school needs to update staff access, the charter school should email [charterschools@lausd.net](mailto:charterschools@lausd.net) with the names and email addresses of staff that need to be added or removed from the Dropbox access. Charter school staff will then receive an email to accept the access. You will create folders labeled Binder 1, Binder 2, Binder 3 and Binder 3A to organize and submit the required documents. Please limit file names to less than 40 characters in length.

**PREPARATION FOR BINDER (hard-copy or electronic)**

In order to facilitate the document review process, it is important to assemble and organize the school's documentation for the first three performance categories into the following binders:

- Binder 1: Governance Documentation
- Binder 2: Student Achievement and Educational Performance Documentation
- Binder 3: Organizational Management, Programs, and Operations Documentation
- Binder 3A: Documentation of Compliance with Clearance, Credentialing, ESSA Qualifications, Mandated Reporter Training requirements and Bloodborne Pathogen Training which must be generated in **hard copy**.

Please note: Some of the documentation is provided as part of the Quarterly submissions. Only include in the oversight binders if there are changes and/or updates to the documents.

**PREPARATION FOR FISCAL OPERATIONS DOCUMENTATION**

As outlined more fully below, all documentation for the fourth performance category, Fiscal Operations, should be submitted **electronically** to the Fiscal Team member assigned to your school **two weeks prior to the fiscal site visit**, which is usually a component of the annual oversight visit but may be scheduled for a different day.

The following sections of this guide provide brief descriptions of the specific documentation needed for each performance category. Include all documentation applicable to the grade levels served by the school.

**BINDER 1: GOVERNANCE DOCUMENTATION**

Please organize the documentation provided in this binder in the order listed below. Include tabbed dividers or file names numbered in accordance with the numbering below.

- 1.1 **Organizational Chart**
  - Current and complete organizational chart (including Governing Board)

Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide

- 1.2 **Bylaws** (Provide if changed after Q1 submission)
  - Organizational chart from current petition
  - Current Governing Board bylaws
- 1.3 **Board Members** (Provide if changed after Q1 submission)
  - Current roster of Governing Board members with contact information along with evidence that Board contact information is accessible to school stakeholders
- 1.4 **Board Meeting Agendas and Minutes**
  - Board meeting agendas and minutes for all meetings held in the last 12 months
- 1.5 **Board Meeting Calendar** (Provide if changed after Q1 submission)
  - Calendar(s) of regular meetings of Governing Board
- 1.6 **Committee(s)/Council(s) Meeting Calendars and Agendas**
  - Calendar(s) and Agenda(s) of Committee(s)/Council(s) with sign-in sheets (titled and dated). Include agendas for School Site Council and for applicable schools, ELAC meetings, which should include all legally required topics
- 1.7 **Evaluation of School Leadership**
  - Evidence of a system of evaluation for chief executive officers and school administrator(s)
- 1.8 **Brown Act Training**
  - Documentation of Brown Act training for Governing Board members, including recent training for all new members
- 1.9 **Agenda Posting Procedures**
  - Documentation of the Board meeting agenda posting procedures, including evidence of implementation (Include evidence that agendas are on the school's website.)
- 1.10 **Parent-Student Handbook(s)**
  - Current and complete Parent-Student Handbook(s) (Provide if changed after Q1 submission)
- 1.11 **Uniform Complaint Procedures** (Provide if changed after Q1 submission)
  - Complete documentation of school/organization's Uniform Complaint Procedures (UCP) policy and forms that meet State and Federal requirements. Information regarding UCP policies and procedures is found at <https://www.cde.ca.gov/re/cp/uc/>.  
**NOTE:** Each charter school must have its own UCP as well as the District's UCP brochure (for special education purposes). The UCP is specific to complaints that could be possible violations of federal or state laws. Independent charter schools should maintain evidence of UCP logs and compliant implementation of regulatory timelines in the event the school is audited. An independent charter school must review and be familiar with UCP requirements and guidance on the California Department of Education (CDE) website (<http://www.cde.ca.gov/re/cp/uc/>), and additionally compare its UCP documents to the LAUSD UCP documents provided on the LAUSD website at lausd.net, in the *Offices* tab, at the *Educational Equity Compliance Office*.
- 1.12 **Stakeholder Complaint Procedure(s)**
  - Evidence of other stakeholder complaint resolution process for complaints outside regulatory scope of UCP, including the school's complaint form(s)
- 1.13 **Human Resources Policies and Procedures**
  - Evidence of policies and procedures specifically related to:
    - o Staff Due Process

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- ESSA Qualification, Credentialing, and Clearance Requirements
- ☐ 1.14 **Data-Based Decision-Making**
  - Evidence of a system for Governing Board review and analysis of school data to inform and support sound decision-making
- ☐ 1.15 **Fiscal Management and Accountability**
  - Evidence of a system for Governing Board establishment, review and monitoring of fiscal policies, procedures, budget, and finances to ensure sound fiscal management

**BINDER 2: STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE**

Please organize the documentation provided in this binder, as applicable to the grade levels served by the school, in the order listed below. Include tabbed dividers or file names numbered in accordance with the numbering below. Prior to the oversight visit, analyze and be prepared to discuss the school's results and any other relevant sources of quantitative performance data that demonstrate the extent to which the school's significant subgroups as well as its schoolwide student population as a whole have experienced increases in academic achievement.

- ☐ 2.1 **LAUSD Office of Data and Accountability Data Set** (provided to the school prior to the visit) and evidence of implementation of data analysis system
- ☐ 2.2 **For schools that are state-identified under the Every Student Succeeds Act (ESSA) as either Comprehensive Support and Improvement (CSI) or Additional Targeted Support and Improvement (ATSI), please provide any and all plans and information provided to the state**
- ☐ 2.3 **ELPAC Criterion Report**
- ☐ 2.4 **Provide Reclassification Criteria (Provide if changed from Q1 submission of English Learner Master Plan) for all applicable grade levels**
- ☐ 2.5 **Provide Graduation Requirements**
- ☐ 2.6 **School Internal Assessment Data** (with analysis of results)
  - Additional quantitative performance data and information gathered and/or produced by the school related to academic performance and progress assessment, monitoring, and **analysis**, such as:
    - Internal Assessments: Internal periodic assessments in ELA and Math. Internal assessment data for grades K, 1, 2, 9 and 10, to include:
      - Internal assessment data process
      - Tool(s) employed to collect data
      - Frequency of collection and growth (from beginning, middle, and end of year)

**NOTE:** Data must include an analysis of schoolwide and disaggregated subgroups for ELA and Math.

**NOTE:** The Internal Assessment data is only to be included as evidence for a new charter school or for charter schools which serve grade levels K, 1, 2, 9 and 10 which are not administered the CAASPP (SBAC).

**NOTE:** For purposes of evaluation of school performance for this indicator, the CSD considers only such data that is derived from standards-based high quality standardized or widely accepted assessments (e.g. SBAC Block Assessments, NWEA, DIBELS) and/or other assessment instruments for which the school can demonstrate validity/reliability

**NOTE:** For your awareness, the oversight report will include the school's ratings on the California School Dashboard. The school's dashboard ratings **will not impact** the overall Student Achievement and Educational Performance Rating for 2019-2020 oversight, but will provide informational areas of focus. California School Dashboard Indicators may, however, figure into next year's 2020-2021 oversight ratings.

### **BINDER 3: ORGANIZATIONAL MANAGEMENT, PROGRAMS, & OPERATIONS DOCUMENTATION**

Please organize the documentation provided in this binder in the order listed below. Include tabbed dividers or file names numbered in accordance with the numbering below. **Note: for co-locations, the charter school adheres and complies with the District school's Health, Safety and Emergency Plan.**

- 3.1 **School Safety and Operations** (School Safety Plan & Procedures)
  - a. **Visitor's Policy:** Copy of policy in Parent-Student Handbook and evidence that policy is posted for the public
  - b. **School Safety Plan:** Comprehensive Health, Safety, and Emergency Preparedness Plan, staff roles and assignments, including evacuation route maps and includes Threat Assessment protocol. It should also include evidence of provisions and locations of onsite emergency supplies
  - c. **Emergency Drills and Training:** Documentation of evidence of conducting safety drills and emergency preparedness staff training
  - d. **Child Abuse Mandated Reporter Training:** Documentation of Child Abuse Mandated Reporter training for all staff and other persons working on behalf of the school who are mandated reporters (Include employee training documentation in Binder 3A)
  - e. **Bloodborne Pathogens Training:** Documentation of Bloodborne Pathogens training for all staff (Include employee training documentation in Binder 3A)
  - f. **Suicide Prevention Policy** for schools serving students in grades 7-12: Inclusive, including evidence of board adoption of the policy; how stakeholders and mental health experts were consulted when developing the policy; professional development on suicide awareness and prevention; and any other activities that support AB 2246.
- 3.2 **Health and Safety**
  - a. **Current and appropriate Certificate(s) of Occupancy (COO)** or equivalent for all non-District sites on which the school operates (Provide if changed after Fall 2018 submission date)
  - b. **Student Immunization and Health Screening:** Evidence that the school provides for the immunization and health screening of its students, including but not limited to screening for vision, hearing, and scoliosis, to the same extent as would be required if the students were attending a non-charter public school  
**NOTE:** Do not provide individual student information
  - c. **Epi-Pen:** Documentation that the school maintains unexpired epinephrine auto-injectors ("epi-pens") onsite and has provided training to volunteer staff in the storage and use of the epi-pen
  - d. **Evidence of providing needy students with one adequate free or reduced priced meal each day per Assembly Bill (AB) 1871**

e. **Automated External Defibrillator (AED) evidence (only for schools who offer an interscholastic athletic program) per AB 2009**

□ 3.3

**School Instructional Programs**

- a. **Standards-Based Instructional Program:** Evidence of grade-level-appropriate California academic standards-based instructional program, which is aligned in accordance with the California Common Core State Standards and the English Language Development standards and the California Next Generation Science Standards. Evidence of staff professional development about Standards-Based Instructional Program (may provide in section 3.4b)
- b. **Local Control and Accountability Plan (LCAP) and English Learner Master Plan or statement you are using the District English Learner Master Plan (Provide if changed after Q1 submission)**
- c. **CAASPP (SBAC) Technology Readiness:** Evidence of technology readiness to administer CAASPP (SBAC) assessments (If existing schools are experiencing difficulty in this area, please notify your CSD administrator)
- d. **WASC Accreditation Notification letter** (as applicable)
- e. **UC Doorways:** Evidence that all A-G high school courses have been approved through UC Doorways (UCOP printout) (as applicable)
- f. **Advanced Placement** examination participating and passage
- g. **A-G:** Completion of and progress toward A-G requirements
- h. **College:** College Acceptance
- i. **Transitional Kindergarten:** Evidence that the school has implemented TK (as applicable)
- j. **Meeting the Needs of All Students:** Evidence of implementation of interventions and supports to meet the learning needs of all students, including implementation of the school's Master Plan for English Learners as well as programs and activities to serve foster youth, socio-economically disadvantaged/students eligible for free and reduced price meals, students performing above and below grade level, students with disabilities, and GATE students/high achievers
- k. **Key Features of Educational Program:** Evidence of implementation of the key features of the educational program set forth in the charter. Evidence of staff professional development about Key Features of Educational Program (may provide in section 3.4b)
- l. **(Schools Serving 9<sup>th</sup> graders):** Evidence of compliance with the Mathematics Placement Act

□ 3.4

**School Management and Operations**

- a. **Special Education:** Evidence of provision of special education programs, services, and procedures in compliance with MCD, including:
  - District Validation Review (DVR) - Documentation of the results of school's most recent (DVR)
  - Self-Review Checklist - Copy of the school's current/up-to-date Special Education Self-Review Checklist
  - Welligent Reports - Copy of the school's most current/up-to-date "IEP200-Annual and Triannual IEP Report" and the "SER300 (printed the week of the oversight visit)
  - Professional Development- Evidence of staff professional development about Special Education (may provide in section 3.4b)

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- b. **Professional Development:** Evidence of the school's professional development programs (e.g., school PD, CMO PD, and educator conferences) to support teachers and other school instructional staff (Can be provided here or in each section, as specified)
- c. **School Climate and Student Discipline:** Evidence of implementation of school climate and student discipline system that aligns with the principles of the District's Discipline Foundation Policy <https://achieve.lausd.net/page/11924#spn-content>, including:
- Tiered Behavior Intervention - Evidence of the school's tiered system of behavioral supports and interventions, such as SSPT
  - Alternatives to Suspension - Evidence of the alternatives to suspension implemented by the school
  - Schoolwide Positive Behavior Support System - Evidence of the school's recognition/incentive program(s) and/or other practices that provide positive behavior reinforcement and support
  - Data Monitoring - Evidence that school collects, analyzes, and responds to data related to school climate and student discipline
  - Professional Development - Evidence of staff professional development about School Climate and Student Discipline (may provide in section 3.4b)
  - Procedures for preventing bullying, including cyberbullying (on or before December 31, 2019)
- d. **Stakeholder Communication and Parent Engagement:** Evidence of a stakeholder communication system for gathering input, encouraging and facilitating parent involvement, sharing information, and resolving concerns, including:
- Stakeholder Consultation - Evidence of stakeholder consultation regarding the school's educational programs and its LCAP and related meeting agendas
  - Parent Engagement - Evidence of parent engagement, including parent involvement policy and compact per Title I (ESSA) requirements
  - Information Sharing - Evidence that the school shares accessible and relevant data and information regarding individual student and school-level performance and progress with all stakeholders (parents/guardians, students, teachers, and community members) as appropriate
  - Transferability of Course Credit/Courses - Evidence that parents are informed about transferability of courses/course credit to other public high schools and the eligibility of courses to meet college entrance requirements
  - Access to Approved Charter - Evidence that the school provides ready access to the school's approved charter to all stakeholders
  - Documentation of complaint resolution process
  - Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) for grades 6-12 per AB 1104
- e. **Stakeholder Communication and Transparency:** Evidence that the school demonstrates informational transparency to stakeholders via documents



available both manually and electronically (website preferred) in the following areas:

- UCP and General Complaint procedures
  - Title IX information in accordance with SB1375 (required on website)
  - AB 2246 Suicide Prevention applicable posting (Gr 7-12)
  - Applicable categories described in LAUSD Charter School Transparency Resolution (schools may provide evidence of other electronic means for this item, if means other than website are utilized)
  - Evidence of notification requirements to pupils and parents on how to initiate access to pupil mental health services per AB 2022
- f. **Staff Evaluation:** Evidence of a system of evaluation for faculty and other staff  
**NOTE:** Please provide this documentation here only if it is not included in Binder 1; see note in Binder 1 section above.

### **BINDER 3A: DOCUMENTATION OF COMPLIANCE WITH CLEARANCE, CREDENTIALING, ESSA QUALIFICATIONS AND MANDATED REPORTER TRAINING REQUIREMENTS**

Please organize the documentation provided in this binder in the order listed below. Include tabbed dividers or file names numbered in accordance with the numbering below.

#### 3A.1 **Certifications and Related School Information**

- a. **Certification (ESSA Grid):** The original signed document and one full-sized copy of the school's completed and signed "Certification of Clearances, Credentialing, ESSA Qualifications, and Mandated Reporter Training 2019-2020" form (often informally referred to as the "ESSA Grid"), on which the school, through its Custodian of Records, certifies compliance with criminal background clearance, tuberculosis (TB) risk assessment/clearance, ESSA teacher and paraprofessional qualifications, credentialing, child abuse mandated reporter training requirements, and blood borne pathogen training for all staff.  
**NOTE:** All school employees as well as all contracting entities/independent contractors ("vendors") providing school-site or student services must be included on the completed form.  
**NOTE:** The completed certification document should be ready and available for CSD review no later than the **7<sup>th</sup> week after the first day of school**. In the event that the school makes any subsequent personnel/ vendor changes, the form needs to be updated to reflect current staff and vendors
- b. **Staff Roster:** Current and complete school staff roster that shows all current assignment(s) for each staff member
- c. **Master Schedule:** Master schedule that also indicates which teachers instruct ELs, and which subjects/courses are identified as "core" and "college preparatory" in the school's approved charter
- d. **Custodian of Records:** Documentation that the school has at least one Custodian of Records who has been confirmed by the California Department of Justice (e.g., DOJ confirmation letter; DOJ Custodian of Records notification)

Please organize and tab the remaining three sections of binder 3A by last name of individual staff members or by contracting entity name. Provide this documentation (items 3A.2 and 3A.3 below) in the **same order as requested on the ESSA Grid**. i.e. *New Certificated Employees* collated by employee, followed by *Continuing Certificated Employees* collated by employee, followed by *New Non-Certificated*

Employees collated by employee, and finally *Returning Non-Certificated Employees* collated by employee.

- 3A.2 **Certificated Employee Documentation**
  - a. **Criminal Background Clearance Certification:** Completed and signed “Criminal Background Clearance Certification” certifying criminal background clearance prior to employment or in any capacity.  
**NOTE:** Ensure all Social Security numbers recorded on these original forms are redacted
  - b. **Credential(s):** Copy of current credential(s) (copy of original certificate(s) or print-out from CTC website), showing issuance and expiration dates, type of credential, subject matter authorization, and type of EL authorization, for each position/assignment performed by the staff member as required by the CDE Administrators Assignment Manual  
**NOTE:** Ensure credential printouts are legible and clearly show all authorizations
  - c. **Additional Authorization Documentation:** Any additional documentation necessary to authorize certificated service (e.g., CBEST, Temporary County Certificate (TCC), Teaching Permit for Statutory Leave (TPSL) documentation for any employee with a one-year credential)
- 3A.3 **Non-Certificated Employee Documentation**
  - a. **Criminal Background Clearance Certification:** Completed and signed “Criminal Background Clearance Certification” certifying criminal background clearance prior to employment or in any capacity.  
**NOTE:** Ensure all Social Security numbers recorded on these original forms are redacted
- 3A.4 **Employee Child Abuse Training Documentation and Bloodborne Pathogen Training:** For all staff members include the supporting documentation of completion of the Child Abuse training within timelines specified in AB 1432 and the Bloodborne Pathogen Training.
- 3A.5 **Contracting Entities Documentation** (For each contracting entity/independent contractor (“vendor”))
  - a. **Clearances and Credentialing Certification:** Current documentation from vendor certifying timely compliance with applicable criminal background and TB risk assessment/clearance requirements for vendor employees, and credentialing requirements for certificated vendor employees, with an appended list of the specific vendor employees covered by the certification.
  - b. **Sole Proprietor Vendors:** Current documentation from charter certifying timely compliance with applicable criminal background and TB risk assessment/clearance requirements for sole proprietors, and credentialing requirements for certificated vendor employees (AB 949 which amends Education Code section 45125.1 to address criminal background clearance procedures for sole proprietors, becomes effective law on January 1, 2018)  
**NOTE:** The charter school is responsible for ensuring that vendors provide the *Vendor Certification of Criminal Background Clearance, Tuberculosis Clearance, and Credential Verification* signed form to the charter school prior to the provision of services to the school.
- 3A.6 **Volunteer Clearances Certification** (if applicable)
  - a. **Clearances Certification:** Documentation certifying that the school has conducted volunteer clearances in accordance with applicable law and policy,

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

including criminal background clearances for all volunteers who perform school-site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students per the requirements of AB 1667, with an appended list of the names of the specific volunteers covered by the certification

**NOTE:** To ensure adherence to HIPAA requirements and purposes, CSD staff will not review individual school staff member tuberculosis clearances or medical records. The CSD reserves the right to review such records as needed on a case-by-case basis and as permitted by law.

## FISCAL OPERATIONS DOCUMENTATION

**PLEASE NOTE:** To assist our schools and our team with preparing for efficient and effective oversight visits, we have provided the list below to identify material and reports that the school needs to submit electronically to the Fiscal Team member assigned to the school three weeks prior to the fiscal site visit for appropriate staff review. All fiscal reports should be in Microsoft Excel unprotected format. All of the materials requested are intended to be documents routinely prepared by the charter school as a part of the regular operation of the school. Please number and name the electronic documents to be provided to the Fiscal Team member in correspondence with the items enumerated below. If an item listed below does not apply, please indicate “Not Applicable” or “N/A” when responding to the CSD’s Fiscal Team member assigned to your school. Also, if an item listed below requires you to prepare something that exceeds what is normally prepared in the regular operation of the school, please inform the CSD Fiscal Team member assigned to your school.

- 1 **Most current** fiscal reports presented to the charter school’s governing board (provide reports presented at one of the meetings held in 2019-2020, and in Microsoft Excel unprotected format, with formulas)
  - a. Balance Sheet: At a minimum, include the categories of assets, liabilities, and net assets used in the audited financials
  - b. Income Statement (Statement of Activities): At a minimum, include the categories of revenue and expenses used in the audited financials
  - c. Cash Flow Statement (including actual receipts and payments) to the end of the current fiscal year and through the next two fiscal years showing detailed sources of revenue and detailed expenditures. The cash flow projection for the current year should include actuals for the months where available and projections for the remaining months of the year. The cash flow should detail the revenue and expense categories for each month. These categories should, at a minimum, be the same categories referenced in the income statement listed above. Accruals for revenues and expenses should also be shown.
- 2 Minutes of the meeting when the above fiscal reports were presented to and approved by the charter school’s governing board
- 3 Minutes of the meeting when the 2019-2020 budget was adopted
- 4 If the school is offering STRS, PERS, and/or Social Security benefits to its employees, evidence that this is done in a manner that is consistent with the charter terms and the Charter Schools Act (Education Code 47611)
- 5 Minutes of the meeting reflecting the selection of the independent auditor
- 6 Minutes of the meeting reflecting the discussion of the most current independent audit report
- 7 Minutes of the meeting reflecting the receipt, review, and approval of fiscal reports submitted to LAUSD

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- 8 Minutes of the meeting reflecting the discussion and resolution of complaints received from staff or vendors, if any
- 9 Minutes of the meeting reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report (this does not apply to charter schools that were not in operation for the 2018-2019 school year)
- 10 A copy of the most current fiscal policies and procedures
  - a. If the most current fiscal policies and procedures do not include procurement guidelines, please provide a copy of the most current procurement policies and procedures that include, but are not limited to, competitive bidding thresholds for the procurement of goods and services, retention of contract records, and adequate segregation of duties
- 11 Minutes of the meeting reflecting approval of the current fiscal policies and procedures and if applicable, minutes of the meeting reflecting the approval of the current procurement policies and procedures
- 12 A copy of the charter school's organizational chart that depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee, who has responsibilities outlined within the charter school's fiscal policies and procedures
- 13 Please provide an itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school
- 14 A description of the relationship between the charter school and any related party<sup>2</sup>, and the business purpose of the related party
- 15 Copies of all signed and executed contracts (including attachments and exhibits) with related parties, including contracts with the charter school's operator and/or the charter school's home office (e.g., management contracts, service agreements, license agreements, affiliation agreements, etc.).
  - a. If the charter school incurs management fees, licensing fees, or any other related party fees, please provide the following information in Microsoft Excel format:
    - i. The percentage and/or rate of the fees;
    - ii. The basis used to calculate the total fees;

---

<sup>2</sup> **Related parties** may include a) affiliates of the entity, b) principal owners of the entity and members of their immediate families, c) management of the entity and members of their immediate families, 4) other parties which the entity may deal if one party controls or can significantly influence the management or operating policies of the other to an extent that one of the transacting parties might be prevented from fully pursuing its own separate interests, and 5) other parties that can significantly influence the management or operating policies of the transacting parties or that have an ownership interest in one of the transacting parties and can significantly influence the other to an extent that one or more of the transacting parties might be prevented from fully pursuing its own separate interests.

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- iii. The terms of the services provided; and
  - iv. A rationale for the percentage and/or rate of the fees and the basis used to calculate the total fees
- 
- 16 If applicable, minutes of the meeting reflecting approval of the management fees, licensing fees, or any other related party fees
  
  - 17 If the charter school has a sole statutory member, please provide the following:
    - a. A copy of the sole statutory member's by-laws
    - b. A copy of the sole statutory member's articles of incorporation
  
  - 18 Check registers documenting all checks and electronic debit transactions for the prior 12 months, in Microsoft Excel format (consolidated into one worksheet, including descriptions of each transaction).
  
  - 19 All credit card statements for the prior six months, and the following:
    - a. A list of all credit cards in Microsoft Excel format that includes the last four digits of each credit card number, the legal name of each credit card holder, and the job title of each credit card holder
  
  - 20 Monthly bank statements and reconciliations for the prior six months, and the following:
    - a. A list of all school bank accounts in Microsoft Excel format that includes the type of account (e.g., checking, savings, money market, etc.), the last four digits of the account, a description of the purpose of the account (e.g., operating, nutrition, ASB, etc.) and the most current ending bank balance for that account
    - b. The bank statements are from the financial institution(s) referenced above and must show all deposits, withdrawals, transfers, electronic expenditures/transfers, use of debit cards, and canceled checks
    - c. The bank reconciliations must reflect the reviews, approvals, and the approval dates, consistent with the charter school's fiscal policies and procedures
    - d. If applicable, a list of all debit cards in Microsoft Excel format that includes the last four digits of each debit card number, the legal name of each debit card holder, and the job title of each debit card holder
  
  - 21 Student body financial records (including Associated Student Body policies and procedures, budgets, cash flow statements and projections, bank statements with reconciliations, audit reports, and other fiscal reports, if applicable)
  
  - 22 Equipment inventory listing (including asset tag numbers, purchase dates, purchase prices, book values, asset life, location of assets, etc.)
  
  - 23 A link to the charter school's website where the Education Protection Account (EPA) allocation and expenditures are posted
  
  - 24 As required by LAUSD's Charter School Transparency Resolution, links to the charter school's website where the current (1) Audited Financial Statements, and (2) Local Control and Accountability Plan (LCAP) are posted

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- 25 If applicable, pertinent information and documentation, including but not limited to, all signed and executed agreements, and the minutes of the meetings reflecting the reviews and approvals of said agreements, related to the following:
  - a. Factoring of receivables;
  - b. Loan(s) or line(s) of credit with any third party lender(s);  
Intercompany transfer(s) and/or intercompany loan(s) (e.g., any intraorganization receivables and payables that are not settled to a zero balance as of the end of the fiscal year); and
  - c. The charter school's plan(s) for the purchases of new school sites, facilities-related expansions, and/or major improvements to the existing and/or new school site
  
- 26 Compliance with AB 1871
  - a. The charter school is to provide a written statement signed by the board president or the chief administrator affirming that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day (except as provided for a charter school that offers nonclassroom-based instruction)
  
- 27 Disclosure of Legal Issues

**NOTE:** Any reference to "Charter School" shall be considered to include Charter Management Organizations, nonprofits, foundations, or other organizations that participate in the management or operation of the "charter school." Paid contractors are excluded unless the suit is brought by or against the Charter Management Organization, nonprofit, foundation, or other organization that participates in the management or operation of the "charter school."

**NOTE:** Disclosures should include civil or criminal cases filed in State or Federal courts; civil or criminal investigations by local, State, or Federal law enforcement authorities; and, enforcement proceedings or investigations by local, State, or Federal regulatory agencies. The information provided must include relevant dates, the nature of the allegation(s), and the outcome.

  - Disclose material information relating to any legal or regulatory proceedings or investigations in which the Charter School is or has been a party and which might have a material impact on the fiscal viability of the Charter School. Such disclosures should include any parent, subsidiary, Limited Liability Company, Limited Liability Partnership related to the management or operation of the charter school, or affiliate of the Charter School.
  - Disclose any civil, criminal, or regulatory actions in which the Charter School, or any current board members, senior officers, senior management personnel, or employee, has been named a defendant in such action in the past five years. Also, include any actions older than five years that remain unresolved.
  - If the charter school has nothing to disclose, per the above, the charter school is to provide a written statement, signed by the board president or the chief administrator that indicates the charter school has nothing to disclose.

*Annual Performance-Based Oversight Visit 2019-2020  
Preparation Guide*

- 28 Any other Fiscal reports [e.g., reports pertaining to grants or bonds, independent audit reports, audit reports by any public agency, and either the most current actuarial report or Accounting Standards Codification 715 report pertaining to Other Post-Employment Benefits (OPEB), etc.], and the school's governing board minutes of all meetings reflecting the discussions of any of the fiscal reports referenced above

**NOTE:** If you have any questions regarding your preparation of documents for our review, please contact your CSD assigned Fiscal Team member, as appropriate, well before your scheduled visit date.





# **LOS ANGELES UNIFIED SCHOOL DISTRICT**

## **CHARTER SCHOOLS DIVISION**

### **ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT\***

### **2019-2020 SCHOOL YEAR**

### **FOR**

**MAGNOLIA SCIENCE ACADEMY 6 - 8013**

Name and Location Code of Charter School

#### **LAUSD Vision**

Every student will receive a quality education in a safe, caring environment, and will be college-prepared and career-ready.

#### **CSD Mission**

The LAUSD Charter Schools Division (CSD) fosters high quality educational opportunities and outcomes for students in the greater Los Angeles community through exemplary charter public school authorizing, oversight, and sharing of promising practices so that all students maximize their potential.

#### **CSD Core Values**

We believe that our success depends on:

- Making decisions that put the interests of students first.
- Serving with high expectations, integrity, professionalism, and commitment.
- Employing authentic, responsive, and effective leadership and teamwork.
- Continuously learning as a dynamic organization.
- Building and sustaining a healthy workplace culture where high performance, diversity, and creativity thrive.
- Developing productive relationships with our charter schools and all stakeholders.

\* Charter School shall comply in a timely manner with all applicable federal and state laws and regulations, as they may change from time to time, including but not limited to matters related to the school's governance, programs, facilities, operations, and/or fiscal management.



<b>Charter School Name:</b>		<b>Magnolia Science Academy 6 (MSA6)</b>			<b>Location Code:</b>	<b>8013</b>
<b>Current Address:</b>			<b>City:</b>	<b>ZIP Code:</b>	<b>Phone:</b>	<b>Fax:</b>
3754 Dunn Drive			Los Angeles	90034	310-842-8555	310-842-8558
<b>Current Term of Charter:</b>				<b>LAUSD Board District:</b>	<b>LAUSD District:</b>	
July 1, 2019 to June 30, 2024				1	West	
<b>Number of Students Currently Enrolled:</b>		<b>Enrollment Capacity Per Charter:</b>		<b>Grades Currently Served:</b>		<b>Grades To Be Served Per Charter:</b>
134		300		6 <sup>th</sup> - 8 <sup>th</sup>		6 <sup>th</sup> - 8 <sup>th</sup>
<b>Total Number of Staff Members:</b>		<b>14</b>	<b>Certificated:</b>	<b>8</b>	<b>Classified:</b>	<b>6</b>
<b>Charter School's Leadership Team Members:</b>			John Terzi, Principal; James Choe, Assistant Principal; David Yilmaz, Chief Accountability Officer; Brenda Lopez, Director of Student Services; Derya Hajmeirza, Director of HR; Alfredo Rubalcava, CEO; Traci Lewin, Director of Math Programs; Katie Mann, EL/ELA Program Coordinator			
<b>Charter School's Contact for Special Education:</b>			Ms. Terry Bourdages			
<b>CSD Assigned Administrator:</b>		Yolanda Jordan		<b>CSD Fiscal Services Manager:</b>		Lourdes Echavarria
<b>Other School/CSD Team Members:</b>		N/A				
<b>Oversight Visit Date(s):</b>		February 20, 2020		<b>Fiscal Review Date (if different):</b>		February 5, 2020
<b>Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):</b>		No		<b>LAUSD Co-Location Campus(es) (if applicable):</b>		N/A
				<b>DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:</b>		N/A

SUMMARY OF RATINGS			
<i>(4)=Accomplished (3)=Proficient (2)=Developing (1)=Unsatisfactory</i>			
Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
4	3	4	3



### CHARTER RENEWAL CRITERIA

In accordance with Education Code §§ 47605 and 47607, in order to renew a charter, the District must determine whether the charter school has met the statutory requirements. Pursuant to the requirements of SB 1290, the District “shall consider increases in pupil academic achievement for all groups of pupils served by the charter school as the most important factor in determining whether to grant a charter renewal.” Ed. Code § 47607(a)(3)(A).

### REPORT GUIDE

In conducting oversight as a charter school authorizer, the District places an emphasis on performance and compliance with applicable law, policy, and the approved charter, as well as on the lead fiduciary role of a charter school’s governing board in the overall success of the school for students. Information gathered through oversight serves as part of the school’s ongoing record of performance and provides important data for the CSD, LAUSD Superintendent, and ultimately the LAUSD Board of Education in making informed decisions about charter school authorization. In designing this document, the District has considered California charter school law, as well as the California State Board of Education’s criteria for evaluating charter schools and the National Association of Charter School Authorizers’ *Principles and Standards of Quality Authorizing*. This reporting tool provides guidelines and criteria used by the CSD to observe, record, assess, and reflect with the charter school on school performance as captured during the annual oversight visit process in these four categories:

**Governance** – demonstrating fulfillment of the governing board’s fiduciary responsibility to effectively direct and provide oversight for the charter public school, including but not limited to enactment and monitoring of policies and procedures to ensure the school’s full compliance with applicable law, policy, and the terms of the charter approved by the LAUSD Board of Education

**Student Achievement and Educational Performance** – demonstrating academic achievement and growth for all students

**Organizational Management, Programs, and Operations** – demonstrating effective leadership and implementation of the governing board’s policies and procedures, as well as the school’s educational program and systems and procedures for the day-to-day operations of the school

**Fiscal Operations** – demonstrating sound fiscal management, appropriate use of public funds, and compliance with regulatory requirements

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2019-2020*. The “Sources of Evidence” sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

The tool employs the following four-point rubric to rate the school’s performance in each category: (4) *Accomplished*, (3) *Proficient*, (2) *Developing*, and (1) *Unsatisfactory*. In addition, the *Summary of School Performance* section in each category captures key findings under one or more of the following headings: (1) Areas of Demonstrated Strength and/or Progress (Note: potential “promising practices” are identified within this section with an asterisk [\*]); (2) Areas Noted for Further Growth and/or Improvement; and, if applicable, (3) Corrective Action Required. Under “Corrective Action Required,” the CSD reports findings of material noncompliance with applicable law, LAUSD charter policy, or the school’s approved charter. **If the report includes any findings under “Corrective Action Required,” the charter school must take immediate and appropriate steps to remedy the identified concern.** In accordance with its “tiered intervention” approach to charter school non-compliance and poor performance, the CSD may also send the school appropriate notices, separate and apart from this report, to provide and document time-specific follow-up as necessary. At the other end of the spectrum of performance, any school that earns a rating of *Accomplished* in any category is encouraged to submit to the CSD a summary of those “promising practices” that the school believes have contributed to its success, in order to support the CSD’s ongoing efforts to promote and facilitate reciprocal sharing of promising practices among education leaders from across the entire portfolio of LAUSD schools.



GOVERNANCE	RATING*
Summary of School Performance	4
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p><b>G2:</b> The Governing Board continues to comply with all material provisions of the Brown Act, including all aspects of SB 126.</p> <p><b>G4:</b> The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements as evidenced by the ESSA Grids and Board minutes.</p> <ul style="list-style-type: none"> <li>As evidenced in Board minutes, the Board approved to hire an Intervention and Instructional Coach at MSA Bell; Memorandum of Understanding with CSULA and the University of Redlands to partner with MSA Bell in an education internship program from July 2019-June 2021; add a part time Resource Specialist Program Teacher to MSA 4 due to increase of students with disabilities; and added a Computer Teacher to MSA 7.</li> </ul> <p><b>G5:</b> The Governing Board monitors school performance and other internal data to inform decision-making.</p> <ul style="list-style-type: none"> <li>As evidenced in Board agendas and minutes, there has been academic updates given to the Board via school leaders, as well as Magnolia Public Schools (MPS) Home Office staff. Academic updates include providing the Board with an overview of the CA Dashboard Indicators and academic performance of all MPS schools,</li> </ul> <p><u>Areas Noted for Further Growth and/or Improvement</u> None</p> <p><u>Corrective Action Required</u> None noted that require immediate action to remedy concerns indicated in this report.</p> <p>Notes: None</p> <p><b>*NOTE:</b> <i>If the CSD gathers or otherwise receives substantial evidence of actual conflict(s) of interest with respect to a governing board member or person in a school leadership position (e.g. CEO or principal), a charter school shall receive a rating of 1 in this category.</i></p>	



**G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S) - GOVERNANCE QUALITY INDICATOR #1**

<p><i>The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:</i></p> <ul style="list-style-type: none"> <li>Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations</li> <li>Evaluation of school’s executive level leadership</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a highly developed system for the evaluation of the school leader(s) <input checked="" type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a partially developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter or any mandated committees/councils, and no system for the evaluation of the school leader(s)	<input checked="" type="checkbox"/> Organization chart <b>(B1.1)</b> <input checked="" type="checkbox"/> Bylaws <b>(B1.2)</b> <input checked="" type="checkbox"/> Board member roster <b>(B1.3)</b> <input checked="" type="checkbox"/> Board meeting agendas, and minutes <b>(B1.4)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars, agendas, minutes and sign-ins <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. <b>(B1.7)</b> <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)

**G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2**

<p><i>The Governing Board has a system in place to ensure it is adhering to applicable open meeting requirements, which protect the public interest in transparency and help to ensure that decisions are made without apparent or actual conflicts of interest:</i></p> <ul style="list-style-type: none"> <li>Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act</li> <li>Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition</li> <li>Governing Board meeting agendas and minutes are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input checked="" type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with most material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with some material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with few material provisions of the Brown Act	<input checked="" type="checkbox"/> Board meeting agendas <b>(B1.4)</b> <input checked="" type="checkbox"/> Board meeting calendar <b>(B1.5)</b> <input checked="" type="checkbox"/> Brown Act training documentation <b>(B1.8)</b> <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures <b>(B1.9)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
--------------------	---	---

**G3: DUE PROCESS - GOVERNANCE QUALITY INDICATOR #3**

*The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the school’s charter, and LAUSD charter policy, to honor and protect the rights of students, employees, parents, and the public in the following areas:*

- Student discipline
- Employee grievances and discipline
- Parent/stakeholder complaint resolution process
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The Governing Board has highly developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input type="checkbox"/> The Governing Board has well-developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input type="checkbox"/> The Governing Board has partially developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input type="checkbox"/> The Governing Board has minimal or no systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, in for students, employees, parents, and the public	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation <b>(B1.11)</b> <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) <b>(B1.12)</b> <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process <b>(B1.13)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



**G4: STAFFING - GOVERNANCE QUALITY INDICATOR #4**

*The Governing Board has a system in place to ensure that appropriate employment and other staffing decisions are made in accordance with applicable law and the terms of its approved charter governing qualifications, clearances and credentialing:*

- The Governing Board has established policies and procedures to ensure that faculty, staff, substitute teachers, and other persons providing service in a certificated position, are appropriately credentialed, authorized and/or otherwise qualified for the positions for which they have been employed/contracted and assigned, in accordance with applicable provisions of law and the school’s charter.
- The Governing Board has established policies and procedures to ensure that the school obtains all necessary employee clearances, including criminal background and tuberculosis (TB) clearances, prior to employment, and keeps all clearances current.
- The Governing Board has established policies and procedures to ensure that the school obtains, monitors, and maintains all necessary and appropriate vendor certifications/waivers regarding vendor employee clearances, including criminal background and tuberculosis (TB) clearances.
- The Governing Board has established policies and procedures regarding requirements for school volunteers, including criminal background clearances for all volunteers who perform school site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students per AB 1667.
- The Governing Board has established and monitors policies governing whether and under what circumstances the school may consider, for paid and volunteer service, candidates who have criminal records.

Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established and monitors policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established some policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established few or no policies and procedures to ensure staffing in compliance with applicable law staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements <b>(B1.13)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> ESSA Grid <input type="checkbox"/> Other: (Specify)



**G5: DATA-BASED DECISION-MAKING - GOVERNANCE QUALITY INDICATOR #5**

<i>The Governing Board has a system in place to ensure ongoing:</i>		
<ul style="list-style-type: none"> <li>Review and use of academic and other internal school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence</li> <li>Monitoring of the school's implementation of its LCAP action plans and progress toward LCAP goals</li> </ul>		
	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making <input checked="" type="checkbox"/> The Governing Board monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making	<input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and internal other data <b>(B1.4)</b> <input checked="" type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making <b>(B1.14)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)

**G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6**

<i>The Governing Board has a system in place to ensure fiscal viability:</i>		
<ul style="list-style-type: none"> <li>The school is fiscally strong and net assets are positive in the prior two independent audit reports.</li> </ul>		
	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input type="checkbox"/> The school is fiscally weak (e.g., inadequate cash flow, etc.) and/or net assets are negative in the most current independent audit report, <b>or</b> the school does not have an independent audit report on file with the Charter Schools Division <input type="checkbox"/> The school is consistently fiscally weak (e.g., inadequate cash flow, etc.) and/or net assets are negative in the prior two independent audit reports, <b>or</b> the school does not have an independent audit report on file with the Charter Schools Division	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances <b>(B1.15)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)





**G7: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE QUALITY INDICATOR #7**

*The Governing Board has a system in place to ensure sound fiscal management and accountability:*

- The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement.

	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement <input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement <input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, <b>or</b> has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, and has recurring areas noted for improvement, <b>or</b> has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.)	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances <b>(B1.15)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

<b>Progress on LAUSD Board of Education and/or MOU Benchmarks related to GOVERNANCE (if applicable):</b>
<b>N/A</b>



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
<b>Summary of School Performance</b>	3
<p><b>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)?</b> <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p><b>If yes, what is the school's identification? (See additional information within "Notes" section below)</b></p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p><b>A3:</b> The schoolwide percentage of students who Met and Exceeded Standards in 6<sup>th</sup> – 8<sup>th</sup> Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median (RSM).</p> <ul style="list-style-type: none"> <li>Per CDE and a data set provided by LAUSD Data and Accountability, 45.63% of MSA 6's students Met and Exceeded Standards on the SBAC in ELA, compared to the RSM of 30.61%.</li> </ul> <p><b>A4:</b> The schoolwide percentage of students who Met and Exceeded Standards in 6<sup>th</sup> – 8<sup>th</sup> Grade on the SBAC in Math is at a rate higher than the RSM.</p> <ul style="list-style-type: none"> <li>Per CDE and a data set provided by LAUSD Data and Accountability, 38.36% of MSA 6's students Met and Exceeded Standards on the SBAC in Math, compared to the Resident Schools Median of 21.13%.</li> </ul> <p><b>A5:</b> The school reclassifies English Learners at a rate higher than the RSM.</p> <ul style="list-style-type: none"> <li>Per the CDE Reclassification Report, 33.3% of MSA 6's English Learners reclassified, compared to the RSM at 25.0%.</li> </ul> <p><b>A6:</b> The school's percentage of "At Risk" English Learners is at rate lower than the RSM.</p> <ul style="list-style-type: none"> <li>Per the CDE's "At-Risk" by Grade report, MSA 6 is at 0%, compared to the RSM at 0.9%.</li> </ul> <p><b>A7:</b> The school's percentage of LTELs is at a rate similar to the RSM.</p> <ul style="list-style-type: none"> <li>Per the CDE's Long-Term English Learners (LTEL) by Grade report, MSA 6 is at 28.6%, compared to the RSM at 28.0%</li> </ul>	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p><b>A1:</b> None of the school's numerically significant subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019.</p> <ul style="list-style-type: none"> <li>Per CDE, MSA 6 has four numerically significant subgroups (English Learners, Latino, Socioeconomically Disadvantaged, and Students with Disabilities). Four out of four declined in ELA. Although not numerically significant, African American students (14), demonstrated growth by 8.33%.</li> </ul> <p><b>A2:</b> Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019.</p> <ul style="list-style-type: none"> <li>English Learners and Students with Disabilities demonstrated declines by 7.49% and 7.79%, respectively. However, Latino and Socioeconomically Disadvantaged students demonstrated growth by 0.14% and 2.85%, respectively.</li> </ul> <p><b>NOTE:</b> See "O4: MEETING THE NEEDS OF ALL STUDENTS..." for more information concerning both <b>A1</b> and <b>A2</b>.</p>	



Corrective Action Required

None noted that require immediate action to remedy concerns indicated in this report.

Notes:

Reclassification Criteria:

- Overall score of 4 on the ELPAC
- Performance level of Basic on the NWEA MAP Reading assessment OR a minimum score of “Nearly Met” in ELA on the SBAC
- Grade “C” or above in ELA
- Parent Consultation

***\*NOTE: A charter school cannot receive a rating in this category greater than a 2 if the school has not met the minimum statutory renewal criteria which requires clear and convincing evidence that the academic performance of the charter school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the schools in the school district in which the charter school is located, taking into account the composition of the pupil population that is served at the charter school (e.g. Resident Schools) as measured in indicators A3 and A4.***



**A1: SBAC SUBGROUP ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #1**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school.

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> None of the school’s subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input type="checkbox"/> Other: (Specify)

**A2: SBAC SUBGROUP MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #2**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school,

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school’s subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input type="checkbox"/> Other: (Specify)



**A3: SBAC SCHOOLWIDE ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #3**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>Schoolwide ELA data (CDE)</li> </ul>		
Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in ELA is at a rate similar to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in ELA is substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability <input type="checkbox"/> Other: (Specify)

**A4: SBAC SCHOOLWIDE MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #4**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>Schoolwide Math data (CDE)</li> </ul>		
Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in Math is at a rate higher than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in Math is at a rate similar to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in Math is at a rate lower than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 <sup>rd</sup> – 8 <sup>th</sup> , 11 <sup>th</sup> Grade on the SBAC in Math is substantially lower than the Resident Schools Median. <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability (ODA) <input type="checkbox"/> Other: (Specify)



**A5: ENGLISH LEARNER RECLASSIFICATION - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #5**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- English Learner reclassification rate for 2018-2019 (CDE)

Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <b>(B2.1)</b> <input type="checkbox"/> ELPAC Criterion reports (CDE) <b>(B2.3)</b> <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels <b>(within “Notes” section above)</b> <input type="checkbox"/> Other: (Specify)

**A6: “AT RISK” ENGLISH LEARNERS – (ELEMENTARY AND SECONDARY SCHOOLS) STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #6**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- Providing supports for At-Risk English Learners 2018-2019 (CDE)

Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> “At-Risk” by Grade report (CDE): 2017-2018 <b>(B2.1)</b>



**A7: LONG TERM ENGLISH LEARNERS (LTELs) - (SECONDARY SCHOOLS) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #7**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>• Providing supports for Long Term English Learners 2018-2019 (CDE)</li> </ul>		
<b>Rubric</b>		<b>Sources of Evidence</b>
<b>Performance</b>	<input checked="" type="checkbox"/> The school’s percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2017-2018) <b>(B2.1)</b>

**A8: FOUR-YEAR ADJUSTED COHORT GRADUATION RATE - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #8**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>• Four-Year Adjusted Cohort Graduation Rate (CDE) <b>(high schools only)</b></li> </ul>		
<b>Rubric</b>		<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE) <b>(B2.1)</b> <input type="checkbox"/> Graduation Requirements <b>(within “Notes” section above)</b> <input type="checkbox"/> Other: (Specify) <hr/> A-G passing grade requirement (e.g. C or D) <b>(CSD internal use only)</b>



**\*INDICATOR A9 IS ONLY APPLICABLE TO NEW CHARTER SCHOOLS WHICH DO NOT HAVE CAASPP (SBAC) SCORES AND CHARTER SCHOOLS WHICH SERVE GRADE LEVELS K, 1, 2, 9, AND 10 (THE GRADE LEVELS WHICH ARE NOT ADMINISTERED THE CAASPP).**

**A9: INTERNAL ASSESSMENT (Grades K, 1, 2, 9, 10 and New Charter Schools) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #9**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, for grades K, 1, 2, 9 and 10 or as a new school with no CAASPP (SBAC) data as measured by:*

- The school's internal assessments (with analysis of results) by subgroups and grade-levels in ELA and Math
- Other academic achievement data gathered or produced by the school, such as Advanced Placement examination participation and passage rates, A-G requirements progress and completion rates, high school graduation rates, and college acceptance rates

*NOTE: For purposes of evaluation of school performance for this indicator, the CSD will consider data derived from assessments for which the school can provide evidence of validity/reliability. For commonly used and recognized assessments this would not be necessary (for example, NWEA, DIBELS, Illuminate, or SBA Interim assessments).*

	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school has demonstrated accomplished levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect significant growth in student achievement in ELA and Math for all subgroups in all grade-levels <input type="checkbox"/> The school has demonstrated proficient levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect moderate growth in student achievement in ELA and Math for the majority of subgroups and grade-levels. <input type="checkbox"/> The school has demonstrated developing levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect limited growth in student achievement in ELA and Math for some subgroups and grade-levels <input type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input checked="" type="checkbox"/> No assessment of performance for this indicator.	<input type="checkbox"/> Internal academic performance and progress data and information <b>(B2.2)</b> <input type="checkbox"/> School Internal Assessment Data Report or equivalent <b>(B2.2)</b> <input type="checkbox"/> Other: (Specify)





**CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS**

**Summary of School Performance**

Indicators A10 – A16 reflect the school’s ratings on the Dashboard. Indicators A10 – A16 will not impact the overall Student Achievement and Educational Performance Rating for 2019-2020 oversight but will provide informational areas of focus.

**I. Academic Performance**

A10: CAASPP English Language Arts -  Grades 3-5  Grades 6-8  Grade 11

Performance Level Color: Yellow

Change Level: Increased

A11: CAASPP Mathematics -  Grades 3-5  Grades 6-8  Grade 11

Performance Level Color: Yellow

Change Level: Increased

A12: English Learner Progress No Performance Color Indicated

Performance Level Color: Not Applicable

Change Level: Not Applicable

A13: College/Career (high schools only)

Performance Level Color: Not Applicable

Change Level: Not Applicable

**II. Academic Engagement**

A14: Chronic Absenteeism

Performance Level Color: Yellow

Change Level: Increased

A15: Graduation Rate

Performance Level Color: Not Applicable

Change Level: Not Applicable

**III. Conditions and Climate**

A16: Suspension Rate

Performance Level Color: Yellow

Change Level: Increased



**NOTES: While there is no Performance Level Color for English Learner Progress, the CA Dashboard indicates that 44.8% of English Learner (EL) students are making progress towards English language proficiency. Progress Level of 44.8% is indicated as Low. The number of EL students is 29.**

**Progress on LAUSD Board of Education and/or MOU Benchmarks related to STUDENT ACHIEVEMENT (if applicable):**

N/A



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
<b>Summary of School Performance</b>	4
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p><b>O2:</b> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens.</p> <ul style="list-style-type: none"> <li>▪ Per evidence in Binder #3, school is compliant with AB 1871 (providing needy students with one adequate free or reduced priced meal each day) and AB 2009 (Automated External Defibrillator)</li> </ul> <p><b>O4:</b> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis.</p> <ul style="list-style-type: none"> <li>▪ Per school leadership, there has been an increase in English Learners, Students with Disabilities, and Socioeconomically Disadvantage students for the past three years. Additionally, school leadership shared that most of English Learners are dually identified as also being a student with a disability. The main focus for instruction and intervention for the 2019-2020 school year has been to increase support for English Learners and Students with Disabilities. In addition to the intervention opportunities already in existence (e.g. Power Math &amp; English classes, after school tutoring, and Saturday school), the school has implemented the following:           <ul style="list-style-type: none"> <li>○ During the first period of the day (SSR), English Learners receive Designated ELD by two English teachers 40 minutes per day.</li> <li>○ Students with Disabilities go to the Learning Center every day to receive support for the Education Specialist.</li> <li>○ All teachers were trained by the new ELA/ELD Program Coordinator during the summer in-services.</li> <li>○ All teachers were trained by the Director of Special Education and Support Services in the area of special education, Universal Design for Learning and Restorative Justice</li> <li>○ New this year: students will receive the MAP testing three times this year, instead of two, in an effort to monitor students' success and adjust teaching as necessary</li> <li>○ School administration identifies students who are struggling and meet with them on a one-to-one basis.</li> <li>○ More technology is being utilized like NextGen Math and ConnectEd to improve Math performance</li> <li>○ Consistency with an emphasis on writing, reading and the use of the MyOn program (reading program/digital library)</li> <li>○ Weekly staff meetings to discuss the academic progress of students and to reflect on current practices. Education Specialist gives teachers weekly updates about Students with Disabilities and shares best practices utilizing accommodations for academic support.</li> <li>○ Teachers are reading <i>The Language-Rich Classroom</i>, by Himmele to enrich them with different strategies on engaging English Learners.</li> <li>○ School is including ELPAC training and practice tests during Designated ELD instruction.</li> </ul> </li> </ul> <p><b>O7:</b> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights.</p> <ul style="list-style-type: none"> <li>▪ School is compliant with AB 2291 (provides procedures for preventing bullying, including cyberbullying)</li> <li>▪ Per school leadership, as of the day of the Performance Based Oversight visit, the school has 0% suspensions.</li> </ul> <p><b>O9:</b> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns.</p> <ul style="list-style-type: none"> <li>▪ Per school leadership, stakeholders receive a Newsletter on a weekly basis.</li> </ul>	



- School is compliant with SB 1104 (evidence of informing parents/guardians of human trafficking prevention resources on its website)
- O10:** The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website.
- School is compliant with AB 2022 (evidence of notification requirements to pupils and parents on how to initiate access to pupil mental health services)

Areas Noted for Further Growth and/or Improvement

- In an effort to increase academic performance and SBAC scores, SEE O4 above
- Per school leadership, another great need is with Chronic Absenteeism for homeless students and students with disabilities.
  - “This school year we are monitoring the absent students very closely and working with a SART team...”
  - New this year is the utilization of Parent Square, a communication tool to help communicate with all families via vest message, voicemail, and email.

Corrective Action Required

None noted that require immediate action to remedy concerns indicated in this report.

Notes:  
None

***\*NOTE: A charter school shall receive a rating of 1 in this category for any of the following reasons: (1) Failed to have Health, Safety, and Emergency Plan in place; (2) Failed to conduct child abuse mandated reporter training in accordance with AB 1432; (3) Failed to complete criminal background clearances for all new staff and sole proprietor (as defined on the ESSA Grid) prior to employment; or (4) Failed to obtain DOJ clearance certification, as appropriate, from a vendor. A charter school cannot receive a rating in this category greater than 2 if any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school’s current approved charter.***



**O1: SCHOOL SAFETY AND OPERATIONS: SCHOOL SAFETY PLAN AND PROCEDURES - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #1**

*The school has a system in place to ensure that:*

- The school has a current site-specific comprehensive Health, Safety, and Emergency Plan  
(Note: for co-locations, the charter school adheres and complies with the District school’s Health, Safety and Emergency Plan)
- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)
- School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting in accordance with the requirements of AB 1432
- School staff receives annual training on the handling of bloodborne pathogens
- The school has a Visitor’s policy and it’s visible in the main office
- A Pupil Suicide Prevention Policy (grades 7-12) is in place, in compliance with AB 2246

	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan <b>(B3.1b)</b> <input checked="" type="checkbox"/> Evacuation route maps <b>(B3.1b)</b> <input checked="" type="checkbox"/> Documentation of emergency drills and training <b>(B3.1c)</b> <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies <b>(B3.1c)</b> <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) <b>(B3.1e)</b> <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation <b>(B3.1d and B3A.4)</b> <input checked="" type="checkbox"/> Bloodborne pathogens training documentation <b>(B3.13 and B3A.4)</b> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> (“ESSA Grid”) <b>(B3A)</b> <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Visitor Policy <input type="checkbox"/> Other: (Specify)



**O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2**

*The school has a system in place to ensure that:*

- For each school site, the school has a current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- School provides documentation of student immunization and
- School provides documentation of health screening per applicable law and terms of the charter (vision screenings upon school entry and every third year thereafter through grade 8 and hearing screenings are mandated in kindergarten/first grade and in second, fifth, eighth, tenth/eleventh grade and upon first school entry)
- School maintains an emergency epinephrine auto-injectors (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen
- Per AB 1871, charter schools are required to provide needy students with one nutritionally adequate free or reduced priced meal each day
- Per AB 2009, any charter school that offers an interscholastic athletic program is required to have at least one automated external defibrillator (AED)

	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent <b>(B3.2a)</b> <input checked="" type="checkbox"/> Evidence of student immunization <b>(B3.2b)</b> <input checked="" type="checkbox"/> Evidence of health screening <b>(B3.2b)</b> <input checked="" type="checkbox"/> Epi-pen documentation <b>(B3.2c)</b> <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) <input type="checkbox"/> Other: (Specify)



**O3: STANDARDS-BASED INSTRUCTION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #3**

<p><i>The school has:</i></p> <ul style="list-style-type: none"> <li>Implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), and the California Next Generation Science Standards (CA NGSS) that are applicable to the grade levels served</li> <li>Obtained WASC accreditation (<b>high schools only</b>)</li> <li>Implemented a system to monitor student progress toward and completion of graduation and A-G requirements (<b>high schools only</b>)</li> <li>Received UC/CSU approval of courses (UC Doorways) (<b>high schools only</b>)</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input checked="" type="checkbox"/> The school has fully-implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS	<input checked="" type="checkbox"/> Evidence of standards-based instructional program ( <b>B3.3a</b> ) <input checked="" type="checkbox"/> Evidence of implementation of CA NGSS ( <b>B3.3a</b> ) <input checked="" type="checkbox"/> LCAP ( <b>B3.3b</b> ) <input type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments ( <b>B3.3c</b> ) <i>*new schools only</i> <input checked="" type="checkbox"/> WASC documentation ( <b>B3.3d</b> ) <input type="checkbox"/> UC Doorways course approval documentation ( <b>B3.3d</b> ) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten ( <b>B3.3i</b> ) <input checked="" type="checkbox"/> Professional development documentation ( <b>B3.4b</b> ) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

**O4: MEETING THE NEEDS OF ALL STUDENTS; SUBGROUP DATA ANALYSIS - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #4**

<p><i>The school:</i></p> <ul style="list-style-type: none"> <li>Implements the differentiation, intervention, and other instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all subgroups identified in the school’s LCAP and by CDE</li> <li>Disaggregates and analyzes data on a regular basis to address individual student needs</li> <li>Implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification)</li> <li>Has appointed a designee to assist and support foster youth</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <input type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and does not consistently modify instruction based on data analysis	<input checked="" type="checkbox"/> Evidence of standards-based instructional program <b>(B3.3a)</b> <input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students <b>(3.3j)</b> <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan <b>(B3.3b)</b> <input checked="" type="checkbox"/> Evidence of implementation of data analysis system program <b>(B2.2)</b> <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent <b>(B2.2)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
--------------------	---	---

**O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #5**

<i>The school has implemented the key features components of the educational program described in the school's charter</i>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter <input checked="" type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has partially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has minimally implemented, or not at all, the key features of the educational program described in the charter	<input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program <b>(B3.3k)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)





**O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6**

*The school has a system in place to ensure that the school:*

- Provides special education programs and services in accordance with students’ IEPs and the terms of the Modified Consent Decree
- Provides special education training for staff in accordance with requirements of the Modified Consent Decree
- Conducts a special education self-review annually, using the Special Education Self-Review Checklist
- Maintains timely IEP timeline records and accurate service provision records in Welligent

	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities <b>(B3.3j)</b> <input checked="" type="checkbox"/> Self-Review Checklist <b>(B3.4a)</b> <input checked="" type="checkbox"/> Other special education documentation <b>(B3.4a)</b> <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education <b>(B3.4a)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

**O7: SCHOOL CLIMATE AND STUDENT DISCIPLINE - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #7**

*The school has a school climate and schoolwide student discipline system in place to ensure that the school’s practices:*

- Align with the principles of the District’s Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student subgroups
- Per AB 2291, adopt on or before December 31, 2019, procedures for preventing acts of bullying, including cyberbullying

	Rubric	Sources of Evidence



<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles <b>(B3.4c)</b> <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST <b>(B3.4c)</b> <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension <b>(B3.4c)</b> <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system <b>(B3.4c)</b> <input checked="" type="checkbox"/> Evidence of data monitoring <b>(B3.4c)</b> <input checked="" type="checkbox"/> LAUSD ODA suspension and expulsion data reports <b>(B2.1)</b> <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates <input checked="" type="checkbox"/> Evidence of implementation of AB 2291 <input type="checkbox"/> Other: (Specify)
--------------------	---	---

**O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8**

<p><i>The school:</i></p> <ul style="list-style-type: none"> <li>• Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs</li> <li>• Provides faculty and other instructional staff with professional development opportunities to improve instructional practice</li> <li>• Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction</li> </ul>	
<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input checked="" type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter	<input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) <b>(B3.4b)</b> <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
--------------------	---	--

**O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9**

*The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:*

- Engages in communication that notifies parents, teachers, pupils and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns
- Provides all stakeholders with appropriate, accessible and relevant information about individual student and schoolwide academic progress and performance
- Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements **(high schools only)**
- Provides parents, teachers, and students with meaningful opportunities for involvement and engagement that meet the requirements and goals of applicable federal and state law, the school’s charter, and the school LCAP
- Per SB 1104, schools that maintain any of grades 6-12, inclusive, to identify the most appropriate methods of informing parents and guardians of pupils in those grades of human trafficking prevention resources and to implement the identified methods by January 1, 2020

<b>Rubric</b>	<b>Sources of Evidence</b>
---------------	----------------------------



<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook <b>(B1.10)</b> <input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Evidence of stakeholder consultation <b>(B3.4d)</b> <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement <b>(B3.4d)</b> <input checked="" type="checkbox"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate <b>(B3.4d)</b> <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) <b>(B3.4d)</b> <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements <b>(B3.4d)</b> <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter <b>(B3.4d)</b> <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
--------------------	---	---

**O10: STAKEHOLDER COMMUNICATION AND TRANSPARENCY- ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #10**

*The school's documents that are available both manually and electronically (website preferred) serve as a vehicle for transparency through its displays and provision of information.*

- Information is easily accessible to the public and school stakeholders
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375\*\*
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year

\*\*required on website



	Rubric	Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a well-developed communication system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed communication system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed communication system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website	<input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders <b>(B3.4e)</b> for: <ul style="list-style-type: none"> <li>• SB 1375 Information</li> <li>• UCP Procedure and Forms</li> <li>• Complaint Forms</li> <li>• AB 2246 (grades 7-12)</li> <li>• LCAP</li> <li>• Financial Audit</li> <li>• Student Demographics</li> <li>• Student Achievement Information</li> </ul> <input checked="" type="checkbox"/> Evidence of implementation of AB 2022 <input type="checkbox"/> Other: (Specify)

**O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11**

<i>The school has a system in place for the evaluation of school staff designed to ensure that:</i>		
<ul style="list-style-type: none"> <li>• the school’s educational program yields high student achievement</li> <li>• the school complies with all applicable legal requirements</li> </ul>		
	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Documentation related to system for evaluation of staff and administrator(s) <b>(B3.4f)</b> <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



**O12: CLEARANCES AND CREDENTIALING COMPLIANCE - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #12**

*The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:*

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform schoolsite services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

Rubric		Sources of Evidence
<b>Performance</b>	<input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) <b>(B3A.1a)</b> <input checked="" type="checkbox"/> Staff rosters and school master schedule <b>(B3A.1 b and c)</b> <input checked="" type="checkbox"/> Custodian(s) of Records documentation <b>(B3A.1d)</b> <input checked="" type="checkbox"/> Criminal Background Clearance Certifications <b>(B3A.2)</b> <input checked="" type="checkbox"/> Teaching credential/authorization documentation <b>(B3A.2a)</b> <input checked="" type="checkbox"/> Vendor certifications <b>(B3A.5)</b> <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification <b>(B3A.6)</b> <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

**Progress on LAUSD Board of Education and/or MOU Benchmarks related to ORGANIZATIONAL MANAGEMENT (if applicable):**

N/A



Annual Performance-Based Oversight Visit Report

8013 Magnolia Science Academy 6	2016-2017					2017-2018					2018-2019				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents		309,957	425,269	754,059	754,059		811,084	1,000,285	1,442,531	1,442,531		0	1,308,993	1,719,960	1,719,960
Current Assets		1,111,611	1,099,539	1,377,897	1,389,727		1,365,004	1,289,212	1,622,340	1,622,399		0	1,625,976	1,983,759	1,993,754
Fixed and Other Assets		37,674	37,674	51,733	51,733		102,842	69,005	27,990	27,990		0	11,433	10,094	10,094
<b>Total Assets</b>		<b>1,149,285</b>	<b>1,137,213</b>	<b>1,429,630</b>	<b>1,441,460</b>		<b>1,467,846</b>	<b>1,358,217</b>	<b>1,650,330</b>	<b>1,650,389</b>		<b>0</b>	<b>1,637,409</b>	<b>1,993,853</b>	<b>2,003,848</b>
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		108,457	12,812	176,677	182,539		180,209	43,491	46,754	46,491		0	17,250	179,563	189,559
Other Long Term Liabilities		0	6,500	0	0		0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
<b>Total Liabilities</b>		<b>108,457</b>	<b>19,312</b>	<b>176,677</b>	<b>182,539</b>		<b>180,209</b>	<b>43,491</b>	<b>46,754</b>	<b>46,491</b>		<b>0</b>	<b>17,250</b>	<b>179,563</b>	<b>189,559</b>
<b>Net Assets</b>		<b>1,040,828</b>	<b>1,117,902</b>	<b>1,252,953</b>	<b>1,258,921</b>		<b>1,287,637</b>	<b>1,314,726</b>	<b>1,603,576</b>	<b>1,603,898</b>		<b>1,744,799</b>	<b>1,620,159</b>	<b>1,814,290</b>	<b>1,814,289</b>
Total Revenues	1,952,604	1,962,456	1,994,599	1,990,263	2,032,981	1,966,979	1,890,155	1,977,708	1,969,508	2,019,409	1,895,880	2,015,550	1,936,283	1,811,766	1,921,870
Total Expenditures	1,622,710	1,878,893	1,822,134	1,682,747	1,731,325	1,789,080	1,855,471	1,921,903	1,624,853	1,674,432	1,835,179	1,874,328	1,920,022	1,601,374	1,711,479
<b>Net Income / (Loss)</b>	<b>329,894</b>	<b>83,563</b>	<b>172,465</b>	<b>307,516</b>	<b>301,656</b>	<b>177,899</b>	<b>34,684</b>	<b>55,805</b>	<b>344,655</b>	<b>344,977</b>	<b>60,701</b>	<b>141,222</b>	<b>16,261</b>	<b>210,392</b>	<b>210,391</b>
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Inc / (Dec) in Net Assets</b>	<b>329,894</b>	<b>83,563</b>	<b>172,465</b>	<b>307,516</b>	<b>301,656</b>	<b>177,899</b>	<b>34,684</b>	<b>55,805</b>	<b>344,655</b>	<b>344,977</b>	<b>60,701</b>	<b>141,222</b>	<b>16,261</b>	<b>210,392</b>	<b>210,391</b>
Net Assets, Beginning	902,942	1,006,776	1,006,776	1,006,776	957,265	1,117,901	1,252,953	1,258,921	1,258,921	1,258,921	1,314,726	1,603,577	1,603,577	1,603,577	1,603,898
Adj. for restatement / Prior Yr Adj	0	(49,511)	(61,339)	(61,339)	0	0	0	5,968	0	0	0	0	321	321	0
<b>Net Assets, Beginning, Adjusted</b>	<b>902,942</b>	<b>957,265</b>	<b>945,437</b>	<b>945,437</b>	<b>957,265</b>	<b>1,117,901</b>	<b>1,252,953</b>	<b>1,258,921</b>	<b>1,258,921</b>	<b>1,258,921</b>	<b>1,314,726</b>	<b>1,603,577</b>	<b>1,603,898</b>	<b>1,603,898</b>	<b>1,603,898</b>
<b>Net Assets, End</b>	<b>1,232,836</b>	<b>1,040,828</b>	<b>1,117,902</b>	<b>1,252,953</b>	<b>1,258,921</b>	<b>1,295,801</b>	<b>1,287,637</b>	<b>1,314,726</b>	<b>1,603,576</b>	<b>1,603,898</b>	<b>1,375,427</b>	<b>1,744,799</b>	<b>1,620,159</b>	<b>1,814,290</b>	<b>1,814,289</b>

8013 Magnolia Science Academy 6	Audited Financials					2019-2020				
	2015-16	2016-17	2017-18	2018-19	2019-20	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	535,854	754,059	1,442,531	1,719,960	0		1,712,887	1,705,049	0	0
Current Assets	1,137,099	1,389,727	1,622,399	1,993,754	0		1,827,107	1,812,083	0	0
Fixed and Other Assets	66,400	51,733	27,990	10,094	0		28,518	15,940	0	0
<b>Total Assets</b>	<b>1,203,499</b>	<b>1,441,460</b>	<b>1,650,389</b>	<b>2,003,848</b>	<b>0</b>		<b>1,855,625</b>	<b>1,828,023</b>	<b>0</b>	<b>0</b>
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	246,234	182,539	46,491	189,559	0		228,713	204,967	0	0
Other Long Term Liabilities	0	0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
<b>Total Liabilities</b>	<b>246,234</b>	<b>182,539</b>	<b>46,491</b>	<b>189,559</b>	<b>0</b>		<b>228,713</b>	<b>204,967</b>	<b>0</b>	<b>0</b>
<b>Net Assets</b>	<b>957,265</b>	<b>1,258,921</b>	<b>1,603,898</b>	<b>1,814,289</b>	<b>0</b>		<b>1,626,912</b>	<b>1,623,056</b>	<b>0</b>	<b>0</b>
Total Revenues	1,978,995	2,032,981	2,019,409	1,921,870	0	1,998,128	1,677,398	1,672,181	0	0
Total Expenditures	1,496,287	1,731,325	1,674,432	1,711,479	0	1,950,181	1,864,776	1,863,415	0	0
<b>Net Income / (Loss)</b>	<b>482,708</b>	<b>301,656</b>	<b>344,977</b>	<b>210,391</b>	<b>0</b>	<b>47,947</b>	<b>(187,378)</b>	<b>(191,234)</b>	<b>0</b>	<b>0</b>
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0
<b>Inc / (Dec) in Net Assets</b>	<b>482,708</b>	<b>301,656</b>	<b>344,977</b>	<b>210,391</b>	<b>0</b>	<b>47,947</b>	<b>(187,378)</b>	<b>(191,234)</b>	<b>0</b>	<b>0</b>
Net Assets, Beginning	474,557	957,265	1,258,921	1,603,898	0	1,620,159	1,814,290	1,814,290	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
<b>Net Assets, Beginning, Adjusted</b>	<b>474,557</b>	<b>957,265</b>	<b>1,258,921</b>	<b>1,603,898</b>	<b>0</b>	<b>1,620,159</b>	<b>1,814,290</b>	<b>1,814,290</b>	<b>0</b>	<b>0</b>
<b>Net Assets, End</b>	<b>957,265</b>	<b>1,258,921</b>	<b>1,603,898</b>	<b>1,814,289</b>	<b>0</b>	<b>1,668,106</b>	<b>1,626,912</b>	<b>1,623,056</b>	<b>0</b>	<b>0</b>



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p><b>Other circumstances and information could influence the rating and are noted in this evaluation.</b></p> <p>MSA 6's fiscal condition is positive and has been upward trending since the 2015-2016 fiscal year. According to the 2018-2019 independent audit report, the school had positive net assets of \$1,814,289 and net income of \$210,391. The 2019-2020 Second Interim projects positive net assets of \$1,623,055 and a net loss of (\$191,234).</p> <p>According to MSA 6's independent audit report dated June 30, 2019, MSA 6 is one of 10 schools operated by Magnolia Educational &amp; Research Foundation. MERF currently has four schools that are authorized by the Los Angeles Unified School District (LAUSD). MERF's fiscal condition is strong. MERF and its charter schools reported positive net assets of \$28,113,703 and net income of \$1,202,741. MERF, without its charter schools, reported positive net assets of \$1,623,663 and net income of \$829,702. According to MERF, during 2018-2019, MSA 6 paid management fees of \$43,658 to MERF for administrative services such as: finance and accounting, human resources and employee relations, Home Office management, information technology, operational compliance support, growth and facilities management, parent and community engagement, and programmatic compliance. These management fees were calculated based on a variable rate driven by the Average Daily Attendance (ADA) for each of the MERF charter schools.</p>	3





**Areas of Demonstrated Strength and/or Progress:**

1. The school’s fiscal condition is positive.

	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Second Interim)
Net Assets	\$957,265	\$1,258,921	\$1,603,898	\$1,814,289	\$1,623,055
Net Income/Loss	\$482,708	\$301,656	\$344,977	\$210,391	(\$191,234)*
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0

\*See Item 27 in the Notes section for further details.

**Areas Noted for Further Growth and/or Improvement:**

Through conducting fiscal oversight and analyzing the data below, the CSD requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the four MERF charter schools that are currently authorized by LAUSD. The CSD reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with the MERF Public Schools Fiscal Policies & Procedures. Any areas noted for further growth and/or improvement relating to MERF’s and its charter schools’ overall compliance to the aforementioned manual are indicated within each charter school’s Annual Performance-Based Oversight Visit Report, which may or may not have been experienced by the specific MERF school named above. Lastly, any exceptions related to the fiscal condition and/or the segregation of duties reviews are school-specific and reviewed separately for each MERF charter school.

**1. Late Fees:**

Based on the CSD’s review of the school’s credit card statements and supporting documentation for the period from May 2019 through October 2019, the CSD noted 13 credit card statements that referenced late fees totaling \$1,470.94 in the aggregate. These late fees are summarized below.



Item #	School	Month	Transaction Date	Amount	Transaction Description
1	MSA 4	May 2019	5/1/2019	\$292.56	Delinquent Charges
2	MSA 4	July 2019	7/1/2019	\$92.96	Delinquent Charges
3	MSA 4	August 2019	8/1/2019	\$77.93	Delinquent Charges
4	MSA 4	October 2019	10/1/2019	\$48.75	Delinquent Charges
5	MSA 6	August 2019	8/1/2019	\$96.72	Delinquent Charges
6	MSA 6	September 2019	9/1/2019	\$244.01	Delinquent Charges
7	MSA 7	May 2019	5/1/2019	\$71.51	Delinquent Charges
8	MSA 7	July 2019	7/1/2019	\$149.64	Delinquent Charges
9	MSA 7	August 2019	8/1/2019	\$220.88	Delinquent Charges
10	MSA Bell	July 2019	7/1/2019	\$37.44	Delinquent Charges
11	MSA Bell	August 2019	8/1/2019	\$31.28	Delinquent Charges
12	MSA Bell	September 2019	9/12/2019	\$29.00	Delinquent Charges
13	MSA Bell	October 2019	10/1/2019	\$78.26	Delinquent Charges
			<b>TOTAL</b>	<b>\$1,470.94</b>	

In response to the CSD’s observations above, MERF’s Chief Financial Officer (CFO) stated that, during Fiscal Year 2018-2019, the organization implemented a new financial system. The CSD was further advised that, while the organization’s 2018-2019 accounts payable were in the process of being closed (at year-end), some delinquency charges were incurred during its reconciliation process. Additionally, MERF’s CFO explained that, during Fiscal Year 2019-2020, the organization discovered the 2018-2019 delinquency charges and subsequently implemented a new American Express reconciliation process, whereby statement reconciliations are processed within 10 days of receipt. Finally, MERF’s CFO shared that, to avoid additional late charges in the future, MERF has established automatic payments and has developed a system to immediately review and reconcile the organization’s credit card statements.

**2. Late Payments to Vendors:**

Based on the CSD’s review of the school’s check register for the period spanning from October 1, 2018 through October 1, 2019, a sample of 46 checks and 12 bank transactions were selected for further review. The CSD noted that 3 out of the 46 checks referenced invoices that were paid late (including one that referenced late fees and interest charges). The items in question are summarized below.



Item #	Check #	Check Issuance Date	Invoice Due Date	Payee	Check Amount	Transaction Description
1	90154	3/4/2019	6/29/2018	CoolSIS Technologies, Inc.	\$1,342.00	“CoolSIS Tech June not paid Services.”
2	73602	6/17/2019	4/1/2019	Eco Home Safe, Inc.	\$175.00	“Monthly Pest Services April.”
3	DDP-00000153	8/16/2019	8/1/2019	Pitney Bowes (Purchase power)	\$451.39	“Late fees \$39.99; Finance charges \$9.68.”

In response to the CSD’s observations above, MERF’s CFO explained that two of the items noted above (i.e., Item # 1 and Item # 2) were paid late as a result of vendors not providing the invoices on time. With respect to Item # 3, the CSD was advised that automatic payments have been established for this vendor, to ensure that all future payments to this vendor are timely.

The CSD recommends that the school implement procedures to track all recurring and non-recurring invoices and billing statements and ensure that all vendors and credit card balances are paid timely, to prevent the school from incurring additional late fees and/or interest charges in the future.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD’s recommendations and the school’s action plans concerning the above-noted findings and observations should be discussed at MERF’s next governing board meeting, but, in any event, no later than 90 days following the school’s receipt of this report. After the school’s next board meeting, it is the school’s responsibility to provide the CSD with its approved board meeting minutes regarding its action plans/steps, and/or proof of implementation of the mitigating actions taken by the school. The CSD will continue to monitor these issues through oversight.

**Other Observations (Items described in this section, while not addressed in the charter school’s Fiscal Policies and Procedures, are recommended for improvement to align with optimal business practices).**

**1. Use of Alternative Payment Methods for School Expenditures (PayPal):**

Based on the CSD’s review of a sample of the school’s credit card transactions, the CSD noted one school expenditure purchased through a PayPal account for the month of May 2019 (in the amount of \$1,203.16, dated 5/3/2019 and payable to PayPal).

During the CSD’s “Segregation of Duties” review at MSA 6 (conducted with MSA 6’s School Principal and its Office Manager), the CSD inquired as to whether the school utilized any alternative payment methods other than credit cards and checks (which would include PayPal and/or any other payment processors). The responses provided to the CSD by all parties who participated in the Segregation of Duties review indicated that the school does not have a PayPal account. During the MERF Home Office visit, the



CSD also inquired about the utilization of any alternative payment methods other than credit cards and checks. The CSD was advised that MERF did not utilize a PayPal account.

In response to the CSD’s observations above, MERF’s Controller stated that MERF would no longer utilize PayPal as one of its payment methods.

The CSD recommends that, if the organization elects to utilize alternative payment methods in the future, MERF should establish written policies and procedures pertaining to the use of alternative payment methods by third party processors and establish proper controls to monitor such transactions. These procedures should also include written guidance regarding: 1) The use of third-party processors (such as PayPal or others that provide comparable services and specify that alternate payment methods are not preferred to and should only be considered when merchants will not accept school checks, ACH transfers, or MERF credit cards; 2) Clarification that purchases made via third-party processor are subject to the same criteria and requirements as all other purchases; (3) Confirmation that, in advance of purchase approvals, MERF staff members shall submit signed copies of the appropriate purchase forms substantiating details concerning:

- a) Who the expenditure is for;
  - b) What the expenditure is for;
  - c) Where the expenditure is made;
  - d) Why the expenditure is made; and
  - e) When the expenditure is made; and
- 4) Guidance stressing that the use of third-party processors shall not be used to bypass appropriate purchase or payment procedures.

**2. Intraorganizational Borrowing:**

Based on the CSD’s review of various MERF governing board meeting minutes during its 2019-2020 fiscal review (including minutes dated October 10, 2016, February 8, 2018, June 13, 2019, July 18, 2019, November 22, 2019, and March 5, 2020), the CSD noted that the MERF schools have been engaging in intraorganizational borrowing/lending. For example, MERF’s October 10, 2016 meeting minutes disclosed its governing board’s approval of intraorganizational loans in Fiscal Year 2016-2017 totaling \$1,150,000 in the aggregate (including the \$700,000 loan from MSA 8 or MSA Bell to MSA Santa Ana for its operational expenses that specified a repayment period of 20 months and a 0% interest rate).

Additionally, MERF’s June 13, 2019 meeting minutes disclosed that its CFO presented the intraorganizational loan repayment plan to the MERF governing board. These meeting minutes indicate that MERF’s CFO discussed the previous repayment schedules and shared that some MERF schools had defaulted on their original repayment schedules, and for that reason, a revised repayment schedule was recommended (which was approved by MERF’s governing board on June 13, 2019).

Among the four MSA schools currently authorized by LAUSD, as of the date of this report, MSA 8 is the only school that is owed a significant balance from the intraorganizational borrowing referenced above. The accounting of the intraorganizational loans due to MSA 8 and the payment terms are summarized below:



Item #	Date	Due To	Due From	Amount	Terms
1	6/13/2019	MSA 8	MERF (MSA Santa Ana)	\$1,811,055	60 months, with 0% interest rate.
2	7/18/2019	MSA 8	MERF (MSA San Diego)	\$300,000	60 months, with 1.90% interest rate.
3	11/22/2019	MSA 8	MERF (MSA San Diego)	\$400,000	60 months, with 1.90% interest rate.
4	3/5/2020	MSA 8	MERF (MSA San Diego)	\$100,000	60 months, with 1.90% interest rate.
<b>Total</b>				<b>\$2,611,055</b>	

In response to the CSD’s observations above, MERF’s CFO provided the following explanation: “Prior to now, all Intraorganization loans have been at 0% interest. However, following discussion[s] with our authorizers (LACOE and LAUSD), MERF has begun charging a reasonable interest rate of new loans in this fiscal year and thereafter. MERF has used the board-approved repayment schedule as representative of the loan agreement, as the repayment schedule contains all of the loan detail information discussed in the sample loan agreement in the FCMAT Guidance. However, we concur that having an actual Intraorganization Loan Agreement in place will help strengthen our documentation process for all future Intraorganization Loans and aligns as closely as possible with the FCMAT recommended procedure.”

The CSD shared information with MERF’s CEO from chapter 8 of the 2017 Fiscal Crisis & Management Assistance Team (FCMAT) California School Accounting and Best Practices Manual (the FCMAT Manual) - which discusses Related Organizations and Intraorganizational Loans and states: “At the end of the fiscal year, each school’s receivable or payable loan account (also known as due to/due from account) should be reconciled. Once balances are reconciled, any charter school or central office intraorganization receivable or payable balance that is not fully repaid as of the close of the fiscal year may result in and be subject to an intraorganization loan agreement. Intraorganization loan agreements between each school and the central office are prepared at the end of the fiscal year to formally document the amount owed between the intercompany accounts and the repayment terms.

Intraorganization receivables and payables terms include the following:

- All intraorganization receivables and payables that may be settled to a zero balance as of the end of the fiscal year are not subject to any repayment terms or interest accruals.
- Any intraorganization receivables and payables that are not settled to a zero balance as of the end of the fiscal year should be converted to intraorganization loan agreements, with terms that includes a reasonable interest rate, monthly or quarterly payments, and a specific duration. The final settlement terms should be determined no later than two months after the close of the fiscal year and are subject to approval by the governing board at its next meeting but before the fiscal year-end independent audit report is completed.”

MERF’s Intra-Organization Receivables and Payables (Due To/Due From) fiscal policy (effective January 2019) states: “At the end of the fiscal year, each school’s receivable or payable account will be reconciled in accordance with G&A 105 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



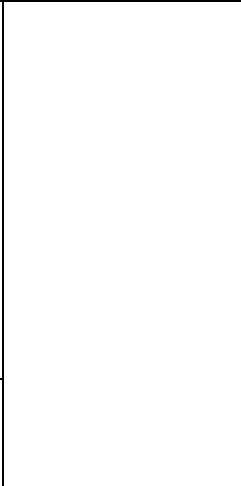
to document the amount owed and repayment terms.” However, MERF’s policy is silent regarding its intraorganizational receivables and payables that are not settled to zero balances as of the end of the fiscal year, and the conversion of these balances to intraorganizational loan agreements with terms that include a reasonable interest rate, monthly or quarterly payments, and specific repayment schedules.

The CSD recommends that MERF incorporate the aforementioned FCMAT’s guidelines into its fiscal policies and procedures, requiring intraorganizational loan agreements for intraorganizational receivables and payables that are not settled or netted to zero balances at the end of the fiscal year.

The Charter Schools Division will review the recommended updates to the school’s fiscal policies by the next oversight visit. The results may be factored into the school’s rating for next year.

**Corrective Action Required:**

None noted that require immediate action to remedy concerns noted in this report.



**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2019 and noted the following:
  - a. Audit opinion: Unmodified
  - b. Material weaknesses: None Reported
  - c. Deficiencies/Findings: None Reported
2. Reviewed bank statements and bank reconciliations from May 2019 through October 2019. Selected the months of May 2019 through October 2019 for sample testing. No discrepancies were noted.
  - a. Citi Bank Checking Account Ending in X5041 (MSA Bell)
  - b. Citi Bank Checking Account Ending in X6769 (MSA 4)
  - c. Citi Bank Checking Account Ending in X6121 (MSA 6)
  - d. Citi Bank Checking Account Ending in X2703 (MSA 7)
3. Reviewed credit card statements from May 2019 through October 2019. Selected the months of May 2019, July 2019, and September 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
  - a. American Express Credit Card Ending in X2002 (Chief Financial Officer, MSA 4)
  - b. American Express Credit Card Ending in X1000 (Chief Financial Officer, MSA 6)
  - c. American Express Credit Card Ending in X2005 (Chief Financial Officer, MSA 7)
  - d. American Express Credit Card Ending in X1006 (Chief Financial Officer, MSA Bell)
4. Reviewed the following 46 checks and 12 bank transactions. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
  - a. Check numbers: 43059, 43069, 43092, 43094, 43105, 43106, 43134, 43158, 70143, 70184, 70201, 70211, 70217, 70238, 73398, 73499, 73553, 73597, 73602, 73612, 73629, 73632, 73636, 73638, 73661, 73666, 73667, 73670, 73674, 73681, 73709, 90154, 90292, 90300, 90316, 90317, 90331, 90335, 90343, 90344, 90347, DDP-00000095, DPP-00000096, DDP-00000116, DDP-00000153, and DDP-00000159.
  - b. Citi Bank Checking X6769 Transactions: (1) 04/01/2019 – (\$21,874.28); (2) 04/15/2019 – (\$387.79); and (3) 04/26/2019 - \$51.84.
  - c. Citi Bank Checking X6121 Transactions: (1) 04/02/2019 – (\$3,871.02); (2) 04/12/2019 – (\$33,143.19); and (3) 09/30/2019 - \$7,944.34.
  - d. Citi Bank Checking X2703 Transactions: (1) 04/10/2019 – (\$381.60); (2) 09/04/2019 – (\$233.23); and (3) 09/09/2019 – (\$2,076.10).
  - e. Citi Bank Checking X5041 Transactions: (1) 04/01/2019 – (\$48,269.06); (2) 04/22/2019 - \$150,000; and (3) 09/23/2019 - \$36.61).
5. Per the 2018-2019 audit report, the school's cash and cash equivalents is \$1,719,960, and total expenditures equal \$1,711,479. Therefore, the school's cash reserve level is 100.5%, which exceeds the recommended 5%.
6. A copy of the charter school's organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee with responsibilities outlined within the charter school's financial policies and procedures was provided.
7. Segregation of Duties (SOD) reviews were conducted at MSA 6. No discrepancies were noted.
8. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
9. MERF disclosed that it has engaged in intraorganizational borrowing relative to the MERF schools currently authorized by LAUSD. This includes the following transactions:



- a. MERF borrowed \$1,811,055 from MSA 8 (with no interest rate and a maturity date of July 15, 2024). Per MERF's governing board resolution dated 6/13/2019, the purposes of this loan were to fund the completion of MSA Santa Ana's Gymnasium project and to cover other operational expenditures.
  - b. MSA San Diego borrowed \$800,000 from to MSA 8 (at 1.90% interest and a maturity date of January 15, 2025). Per MERF's governing board resolution dated 3/5/2020, the purpose of this loan was to meet MSA San Diego's cash needs- including the funding of payroll and other operational expenditures.
10. Pursuant to AB 1871, a signed written statement that indicates that MSA 6 is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
  11. MERF provided documentation regarding 13 pending legal matters. Five of these claims related to Individualized Education Programs (IEPs) pertaining to Special Education students, three personal injury claims, and five claims relating to property crimes and/or employment-related disputes. The filing dates for these claims ranged from Fiscal Year 2016-2017 through Fiscal Year 2019-2020. MERF asserted that all of these matters are covered by MERF's insurance. MERF further stated: "None of these matters has a material impact on the financial viability of Magnolia or its affiliated parties."
  12. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
  13. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
  14. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
  15. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
  16. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
  17. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
  18. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
  19. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
  20. Evidence of MSA 6 offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
  21. Equipment inventory was provided.
  22. The 2019-2020 LCAP was submitted to LAUSD.
  23. The most current LCAP is posted on the charter school's website.
  24. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school's website.
  25. The most current Audited Financial Statements are posted on the charter school's website.
  26. The 2018-2019 audited and unaudited actuals nearly mirror each other.
  27. According to MERF's CFO, the projected net loss of **(\$191,234)** as reflected in MSA 6's 2019-2020 Second Interim is primarily due to: 1) The school not meeting its enrollment target of 160 students (the school's 2019-2020 Norm Enrollment was 134 students); and 2) The school's enrollment of Special Education students (which was 26% higher than expected and was accompanied by increased related expenditures).





**Progress on LAUSD Board of Education and/or MOU Benchmarks related to FISCAL OPERATIONS (if applicable):**

As part of its renewal petition approved by the LAUSD Board of Education on October 23, 2018, during the 2019-2024 charter term, MSA 6 must meet the fiscal benchmark below in order to address the school's fiscal operations concerns.

The school shall provide a written status report to the Charter Schools Division no later than December 15 of each year of the charter term demonstrating its progress related to the following:

1. MERF's continuous improvement in the school's fiscal management and operations, based on the recommendations made by School Services of California.

To date, MSA 6 has complied with the benchmark cited above. The CSD will continue to monitor the school's progress and compliance with the fiscal benchmark above through the remainder of the school's charter term.



**Fiscal Operations Rubrics**

*Existing School* – a charter school that has at least one annual independent audit on file with the Charter Schools Division [Possible Rating 1-4]

*New School* – a charter school that does not have an independent audit on file with the Charter Schools Division [Possible Rating 1-2]

<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<p><b><u>Existing Schools (based on the most current annual audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive in the prior two audits;</li> <li>2. The cash balance at the beginning of the school year is positive;</li> <li>3. The two most current audits show no material weaknesses, deficiencies and/or findings;</li> <li>4. All vendors and staff are paid in a timely manner;</li> <li>5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>6. Charter school adheres to the governing board approved Fiscal Policies and Procedures;</li> <li>7. Governing board adopts the annual budget;</li> <li>8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;</li> <li>9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;</li> <li>10. There is no apparent conflict of interest;</li> <li>11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871);</li> <li>12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website;</li> <li>13. The LCAP is submitted to the appropriate agencies;</li> </ol>	<p><b><u>Existing Schools (based on the most current annual audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive in the most current audit;</li> <li>2. The cash balance at the beginning of the school year is positive;</li> <li>3. The most current audit shows no material weaknesses, deficiencies and/or findings;</li> <li>4. Vendors and staff are paid in a timely manner;</li> <li>5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures;</li> <li>7. Governing board adopts the annual budget;</li> <li>8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;</li> <li>9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;</li> <li>10. There is no apparent conflict of interest;</li> <li>11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871);</li> <li>12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website;</li> <li>13. The LCAP is submitted to the appropriate agencies;</li> </ol>



<p><b><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></b></p> <ol style="list-style-type: none"> <li>14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;</li> <li>15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner;</li> <li>16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement;</li> <li>17. Audited and unaudited actuals nearly mirror each other;</li> <li>18. Proper segregations of duties are in place; and</li> <li>19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s).</li> </ol> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> <p style="text-align: center;"><b><u>SUPPLEMENTAL CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Positive Net Assets exceed 4% of prior year expenditures;</li> <li>2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses;</li> <li>3. A comprehensive website that provides at a minimum six of the following fiscal items:             <ul style="list-style-type: none"> <li>○ Most current financial reports presented to the governing board</li> <li>○ Employee handbook</li> <li>○ Student handbook</li> <li>○ Salary schedules/benefits/information</li> <li>○ Budget development process</li> <li>○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location</li> <li>○ The most current approved petition</li> <li>○ Administration/school contact</li> <li>○ School calendar</li> <li>○ Enrollment policies and procedures</li> <li>○ Fiscal policies and procedures manual</li> </ul> </li> </ol>	<p><b><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></b></p> <ol style="list-style-type: none"> <li>14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;</li> <li>15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner;</li> <li>16. There are no significant recurring issues; and</li> <li>17. Audited and unaudited actuals nearly mirror each other.</li> </ol> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> <p style="text-align: center;"><b><u>SUPPLEMENTAL CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Positive Net Assets exceed 3% of prior year expenditures;</li> <li>2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses;</li> <li>3. A comprehensive website that provides at a minimum six of the following fiscal items:             <ul style="list-style-type: none"> <li>○ Most current financial reports presented to the governing board</li> <li>○ Employee handbook</li> <li>○ Student handbook</li> <li>○ Salaries schedule/benefits/information</li> <li>○ Budget development process</li> <li>○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location</li> <li>○ The most current approved petition</li> <li>○ Administration/school contact</li> <li>○ School calendar</li> <li>○ Enrollment policies and procedures</li> <li>○ Fiscal policies and procedures manual</li> </ul> </li> </ol>
---	---



<p><b><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></b></p>	<p><b><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></b></p>
<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

<p><b><i>An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.</i></b></p>	<p><b><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></b></p>
<p><b><u>Existing Schools (based on the most current audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond);</li> <li>2. The cash balance at the beginning of the school year is positive;</li> <li>3. Vendors and staff are paid in a timely manner;</li> <li>4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>5. Governing board adopts the annual budget;</li> <li>6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871);</li> <li>7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website;</li> </ol>	<p><b><u>Existing Schools (based on the most current audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p>



*An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.*

- 8. The LCAP is submitted to the appropriate agencies;
- 9. Have an audit conducted annually by an independent auditing firm; and
- 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

Note: Other circumstances and information could influence the rating and will be noted in the evaluation.

**SUPPLEMENTAL CRITERIA**

- 1. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities);
- 2. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract;
- 3. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting;
- 4. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;
- 5. Current audit shows no material weaknesses, deficiencies and/or findings;
- 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures;
- 7. There is no apparent conflict of interest; and
- 8. Governing board approves any amendment(s) to the charter school's budget.

Note: Other circumstances and information could influence the rating and will be noted in the evaluation.

*An existing school would be assessed as Unsatisfactory based on the statements below:*

Note: Other circumstances and information could influence the rating and will be noted in the evaluation.



<p><b><i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i></b></p>	<p><b><i>A new school would be assessed as Unsatisfactory based on the statements below:</i></b></p>
<p><b><u>New Schools:</u></b></p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. A new school is one that does not have an independent audit on file with the Charter Schools Division;</li> <li>2. The cash balance at the beginning of the school year is positive;</li> <li>3. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement;</li> <li>4. Projected debt is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;</li> <li>5. Interim reports and unaudited actuals project:             <ol style="list-style-type: none"> <li>a. Positive net assets</li> <li>b. Expenses less than revenues</li> <li>c. Projected expenses and revenues have no significant variance from budget</li> </ol> </li> <li>6. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes;</li> <li>7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871);</li> <li>8. The most current governing board-approved LCAP are posted on the charter school’s website; and</li> <li>9. The LCAP is submitted to the appropriate agencies.</li> </ol> <p><b>Note:</b> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.</p>	<p><b><u>New Schools:</u></b></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. A charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p> <p><b>Note:</b> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.</p>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 6

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/20/2020

<p><i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i></p>	<p><i>A new school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



**CALIFORNIA DEPARTMENT  
OF EDUCATION**

**TONY THURMOND**  
STATE SUPERINTENDENT OF  
PUBLIC INSTRUCTION

1430 N STREET, SACRAMENTO, CA 95814-5901 • 916-319-0800 • WWW.CDE.CA.GOV

February 24, 2020

Haim Beliak, Board Chair  
Erdinc Acar, Regional Director  
Alfredo Rubalcava, Superintendent of Instruction  
Steven Keskindurk, Principal  
Magnolia Science Academy – Santa Ana  
2840 West 1<sup>st</sup> Street  
Santa Ana, CA 92703

Dear Board Chair Beliak, Director Acar, Superintendent Rubalcava, and Principal Keskindurk:

Subject: Summary of Annual Site Visit for Magnolia Science Academy – Santa Ana  
Conducted on February 5 and 6, 2020

Thank you for the opportunity to visit Magnolia Science Academy – Santa Ana (MSA-SA). The California Department of Education (CDE) appreciates the tremendous amount of work you orchestrated before and during the site visit.

Based on interviews conducted with school leadership and staff, and through classroom observations, the CDE reviewed the information gathered and has determined that MSA-SA is in compliance with the MSA-SA charter petition, and the Memorandum of Understanding between the California State Board of Education and MSA-SA.

Additionally, as California Assessment of Student Performance and Progress data and fiscal reports become available, the CDE will continue to monitor the academic performance and fiscal viability of MSA-SA, which could result in the CDE requesting a written response, an action plan, or additional documentation.

If you have any questions regarding this letter, please contact Carrie Lopes, Associate Division Director, by phone at 916-322-6029 or by email at [clopes@cde.ca.gov](mailto:clopes@cde.ca.gov).

Sincerely,

/s/

Stephanie Farland, Director  
Charter Schools Division

SF:mlh

cc: Karen Stapf Walters, Executive Director, California State Board of Education



Haim Beliak, Board Chair  
Erdinc Acar, Regional Director  
Alfredo Rubalcava, Superintendent of Instruction  
Steven Keskindurk, Principal  
February 24, 2020  
Page 2

Khieem Jackson, Deputy Superintendent, Equity and Access Branch, California  
Department of Education

*Sent via First Class Mail and Email to:*

[hbeliak@magnoliapublicschools.org](mailto:hbeliak@magnoliapublicschools.org)

[eracar@magnoliapublicschools.org](mailto:eracar@magnoliapublicschools.org)

[arubalcava@magnoliapublicschools.org](mailto:arubalcava@magnoliapublicschools.org)

[skeskinturk@magnoliapublicschools.org](mailto:skeskinturk@magnoliapublicschools.org)