



Board Agenda Item #	III A – Discussion Item
Date:	April 12, 2018
To:	Magnolia Board of Directors
From:	Caprice Young, Ed.D., CEO & Superintendent
Staff Lead:	David Yilmaz, Chief Accountability Officer
RE:	Oversight School Visits Overview

Proposed Board Recommendation

Information 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 2017-18. 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. Also find **attached** office manager monthly report and project deadline calendar to get a glimpse of how compliance projects are broken down for the office managers to prepare timely submissions to our authorizers.

2017-18 Oversight Visits

All MPS schools have been visited by their respective authorizers. The following are the oversight visit details for 2017-18:

School	Authorizer	Visited?	Notes
MSA-1	LACOE	Yes	Facility visit conducted
MSA-2	LACOE	Yes	Facility visit conducted
MSA-3	LACOE	Yes	Facility visit conducted
MSA-4	LAUSD	Yes	
MSA-5	LAUSD->LACOE	Yes (by LAUSD)	Facility visit to be conducted by LACOE
MSA-6	LAUSD	Yes	
MSA-7	LAUSD	Yes	

MSA-Bell	LAUSD	Yes	Public School Choice
MSA-San Diego	SDUSD	Yes	SD Board Rep should be available
MSA-Santa Ana	SBE	Yes	2-day visit; Board member attendance required

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 also gives 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. The following are ratings our LAUSD authorized schools received in 2016-17 and 2017-18:

Authorizer Oversight Visit Reports	Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
2017-18				
MSA-4	3	3	3	3
MSA-5	3	3	3	3
MSA-6	3	3	3	3
MSA-7				
MSA-BELL	3	3	3	3
2016-17				
MSA-1	3	3	3	2
MSA-2	3	3	3	2
MSA-3	3	3	3	2
MSA-4	3	3	3	2
MSA-5	3	3	3	2
MSA-6	3	3	3	2
MSA-7	3	3	4	2
MSA-BELL	3	3	3	2

So far we have received 2017-18 oversight visit reports for MSA-4, 5, 6, and Bell from LAUSD, and the attached letter from the CDE for MSA-Santa Ana. The letter states that the school is in compliance with the charter petition and the MOU.

Areas Noted for Further Growth and/or Improvement from Oversight Visit Reports

GOVERNANCE:

- The Magnolia Public Schools governing board is encouraged to continue discussions and supports at the school site level in the incorporation of STEM, STEAM, or STREAM within different content areas and classrooms.
 - While there is evidence of a Superintendent Performance Evaluation Form, it recommended that the Magnolia Public School (MPS) Board create an evaluation protocol for the CEO/Superintendent of MPS.
 - **UPDATE regarding the Settlement Agreement with LAUSD:** Magnolia Education and Research Foundation (MERF) and School Services California executed an amendment to the original contract on 12/12/17 to extend the oversight services through July 31, 2018. This amendment extended the scope of work to cover the months of January through April 2018, with field work and management letters addressing these four months by June 30, 2018. The Charter School Division will continue to monitor MERF's compliance of the fiscal oversight provision required in the March 2015 Settlement Agreement between LAUSD and MERF through the end of the current charter term.
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STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE:

ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS:

- **MSA-4: Note:** While the school has made progress in meeting the needs of all students, school leadership recognizes the need for improvement in both ELA and Math, per recent SBAC and internal MAP data **(SEE STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE)**
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FISCAL OPERATIONS:

Areas of Demonstrated Strength

1. The school's fiscal condition is strong
2. March 2015 Settlement Agreement Status

Areas Noted for Further Growth and/or Improvement

1. Bank Reconciliation Reports

2. Credit Cards
3. Automated Clearing House (ACH)/Recurring Automatic Payments

Other Observations:

1. During the 2017-2018 fiscal oversight process, the CSD noted instances whereby MERF did not respond or provide documentation/information pertaining to the CSD's requests within the CSD's stated deadlines.
2. Based on the CSD's review of a sample check disbursements, the CSD noted the instances listed in the table below, whereby the documentation provided did not contain itemized receipts for the related purchases, even though the reimbursements were supported by other documentation.
3. The CSD recommends that, beginning in 2017-2018, MERF present and discuss the CSD's Annual Performance-Based Oversight Reports with its governing board, and document said discussion regarding same. This is one of the required fiscal items in the CSD's Annual Performance-Based Oversight Visit Preparation Guide, beginning in 2017-2018.

Corrective Action Required:

The governing board and leadership team of the charter school are responsible for managing the day-to-day operations of the school. Thus, the CSD's recommendations concerning the above-noted findings and observations should be discussed at MERF's next board meeting, but, in any event, no later than 60 days following the school's receipt of this report. After the schools' 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 staff will continue to monitor these issues through oversight.

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

WASC Visits

All our high schools are accredited by WASC and our courses are transferrable, and a-g approved. In addition, even though it is not required, we have chosen to get our middle and elementary schools WASC-accredited since this process provides an excellent opportunity for self-study of the school staff for continuous improvement. There are different types of WASC visits depending on where the school is in its accreditation cycle. The most comprehensive one, a self-study visit, takes 3 ½ days; it starts on Sunday and ends on Wednesday afternoon. An initial visit is a one-day visit and a mid-cycle visit is a one- or two-day visit.

An initial WASC visit typically results in a 3-year accreditation where the school goes through a self-study and is visited in the third year for a 6-year accreditation. The school is then visited again during the third year of the 6-year cycle; this is called a mid-cycle visit. During their visit the visiting committees interview the board, so board member attendance in person or on the phone is required. For a self-study visit, board member interview would typically take place on Sunday or Tuesday of the visit. For other visits it varies. The following table shows expected WASC visits to our schools in 2018-19.

School	Accredited until	Visit in 2018-19?	Notes
MSA-Santa Ana	June 30, 2018	No	Self-Study Visit DONE
MSA-San Diego	June 30, 2019	Yes	Self-Study Visit
MSA-4	June 30, 2019	Yes	Self-Study Visit
MSA-5	June 30, 2019	Yes	Initial Visit
MSA-1	June 30, 2021	No	Initial Visit DONE
MSA-2	June 30, 2021	No	Initial Visit DONE
MSA-3	June 30, 2021	No	Initial Visit DONE
MSA-6	June 30, 2022	Yes	Mid-Cycle Visit
MSA-7	June 30, 2022	Yes	Mid-Cycle Visit
MSA-Bell	June 30, 2022	Yes	Mid-Cycle Visit

Budget Implications

N/A

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

N/A

Name of Staff Originator:

David Yilmaz, Chief Accountability Officer

Attachments

- Attachment A - Annual Performance-Based Binder Prep Guide 2017-2018
- Office Manager Monthly Report & Project Deadlines
- January 2018 Site Visit Letter No Concerns (MSA-Santa Ana)
- Oversight Visit Reports for MSA-4, 5, 6, and Bell



**CALIFORNIA DEPARTMENT
OF EDUCATION**

TOM TORLAKSON
STATE SUPERINTENDENT OF
PUBLIC INSTRUCTION

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Sent via First Class Mail and E-mail to:
ssherkhanov@magnoliapublicschools.org
eracar@magnoliapublicschools.org
vqurler@magnoliapublicschools.org

March 27, 2018

Saken Sherkhanov, Board Chair
Erdinc Acar, Regional Director
Varol Gurler, Director of Education
Magnolia Science Academy–Santa Ana
2840 West 1st Street
Santa Ana, CA 92703

Dear Mr. Sherkhanov, Director Acar, and Director Gurler:

Subject: Summary of Annual Site Visit for Magnolia Science Academy–Santa Ana
Conducted on January 10 and 11, 2018

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.

If you have any questions regarding this letter, please contact me by phone at 916-323-2694 or by e-mail at juhall@cde.ca.gov.

Sincerely,

/s/

Judie Hall, Education Administrator
Charter Schools Division
JH:mlh

cc: Karen Stapf Walters, Executive Director, California State Board of Education
Nick Schweizer, Deputy Superintendent, Systems Support Branch, California
Department of Education
Lisa Constancio, Director, Charter Schools Division, California Department of
Education



LOS ANGELES UNIFIED SCHOOL DISTRICT **CHARTER SCHOOLS DIVISION**

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT **2017-2018 SCHOOL YEAR** **MAGNOLIA SCIENCE ACADEMY 4**

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 Name:		Magnolia Science Academy 4			Location Code:	8011
Current Address:		City:	ZIP Code:	Phone:	Fax:	
1330 W. Graham Place B-9		Los Angeles	90064	310-473-2464	310-473-2416	
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2013 to June 30, 2018			4	West		
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:	
183		360	6-12		6-12	
Total Number of Staff Members:	18	Certificated:	11	Classified:	7	
Charter School's Leadership Team Members:		Lisa Ross, Principal; Sam Fagnoli, Dean of Academics/Students				
Charter School's Contact for Special Education:		Dr. Jon Gary, RSP Teacher				
CSD Assigned Administrator:	Yolanda Jordan		CSD Fiscal Services Manager:	Lourdes Echavarria		
Other School/CSD Team Members:		Helena Yoon-Fontamillas				
Oversight Visit Date:		March 6, 2018		Fiscal Review Date (if different):	February 1, 2018	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):		Yes (Prop 39)		LAUSD Co-Location Campus (if applicable):	Webster Middle School	
				DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:	June 2, 2017	

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
3	3	3	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. 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 2017-2018*. 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	3

Areas of Demonstrated Strength and/or Progress

G1: 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)

- As evidenced in Binder #1, there is evaluation protocol that details how and when school leaders are evaluated. Additionally, it measures school leaders using the California Professional Standards for Education Leaders (CPSELs)
- While there is evidence of a Superintendent Performance Evaluation Form, it recommended that the Magnolia Public School (MPS) Board create an evaluation protocol for the CEO/Superintendent of MPS.

G4: 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 as evidenced by reviewing MPS board meeting minutes and agendas, as well as the ESSA Grids at school sites.

G5: The Governing Board monitors school performance and other internal data to inform decision-making

- As evidenced in Board meeting agendas, minutes, and Academic Committee meeting minutes, academic “Glows, Grows and Next Steps” are discussed to inform decisions regarding each MPS school’s academic trajectory

Areas Noted for Further Growth and/or Improvement

Corrective Action Required

None

Notes:

Other: The Magnolia Public Schools governing board is encouraged to continue discussions and supports at the school site level in the incorporation of STEM, STEAM, or STREAM within different content areas and classrooms.

UPDATE regarding the Settlement Agreement with LAUSD: Magnolia Education and Research Foundation (MERF) and School Services California executed an amendment to the original contract on 12/12/17 to extend the oversight services through July 31, 2018. This amendment extended the scope of work to cover the months of January through April 2018, with field work and management letters addressing these four months by June 30, 2018.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 4

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 3/6/2018

The Charter School Division will continue to monitor MERF's compliance of the fiscal oversight provision required in the March 2015 Settlement Agreement between LAUSD and MERF through the end of MSA Bell's current charter term.

On 11/7/17 the LAUSD BOE voted on non-renewal for MSA 5.
All details are delineated in the Findings of Fact BOE Report #179-17/18.

****NOTE: 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.***



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"> Governing Board (composition, structure, roles and responsibilities) committees/councils, including but not limited to those mandated by laws or regulations evaluation of school's executive level leadership 		
Performance	Rubric	Sources of Evidence
	<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 (B1: 1) <input checked="" type="checkbox"/> Bylaws (B1: 2) <input checked="" type="checkbox"/> Board member roster (B1: 3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars and agendas <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1: 7) <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"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act 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 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 		
Performance	Rubric	Sources of Evidence



Performance	<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 and minutes (B1: 4) <input checked="" type="checkbox"/> Board meeting calendar (B1: 5) <input checked="" type="checkbox"/> Brown Act training documentation (B1: 8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1: 9) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
Performance	<input 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 checked="" 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 (B1: 4) <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1: 10) <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation (B1: 11) <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) (B1: 12) <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process (B1: 13.1) <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
Performance	<ul style="list-style-type: none"> <input 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1: 10) <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements (B1: 13.2) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

<p><i>The Governing Board has a system in place to ensure:</i></p> <ul style="list-style-type: none"> 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 ongoing monitoring of the school’s implementation of its LCAP action plans and progress toward LCAP goals 		
	Rubric	Sources of Evidence
Performance	<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 (B1: 4) <input checked="" type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making (B1: 14) <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

<p><i>The Governing Board has a system in place to ensure fiscal viability:</i></p> <ul style="list-style-type: none"> The school is fiscally strong and net assets are positive in the prior two independent audit reports. 		
	Rubric	Sources of Evidence
Performance	<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 and net assets are negative in the most current independent audit report, or 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 and net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division	<input type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input 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.

	Rubric	Sources of Evidence
Performance	<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, or 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, or 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 (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>A2: All subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17</p> <ul style="list-style-type: none"> Per SBAC data, Latino students increased by 8.51 percentage points and Socioeconomically Disadvantaged students increased by 5.06 percentage points in Math. <p>A4: The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate equal to the Resident Schools Median</p> <ul style="list-style-type: none"> Per SBAC, school-wide data reveal 17.20%, compared to Resident School Median at 16.78% <p>A5: The school reclassifies English Learners at a rate higher than the District average</p> <ul style="list-style-type: none"> Per Reclassification Report from the CDE, MSA 4’s reclassification rate is 47.1%, compared to the District average of 16.8% <p>A6: The school’s percentage of “At Risk” English Learners is at rate lower than the District average</p> <ul style="list-style-type: none"> Per the CDE, MSA 4’s “At Risk” rate is at 2.1%, compared to the District average of 5.9% <p>A8: The school’s Four-Year Cohort Graduation Rate is at a rate higher than the District average</p> <ul style="list-style-type: none"> Per CDE, MSA 4’s Four-Year Cohort Graduation Rate is 90.9%, compared to the District average at 77%. Per school leadership, the 2016-2017 graduation rate was 100% and 100% college acceptance rate <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>A1: None of the school’s subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17</p> <ul style="list-style-type: none"> Per SBAC data, both numerically significant subgroups (Latino and Socioeconomically Disadvantaged students) showed declines in ELA Per school leadership, MSA 4 made a switch from Accelerated Reader to MyOn, which is a reading program that uses a digital library. The purpose of the switch is to further support student’s academic success and book ELA CAASPP scores. Additionally, per school leadership, teachers continue to focus on school-wide vocabulary implementation <p>A3: The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median</p> <ul style="list-style-type: none"> Per SBAC data, school-wide data reveals 31.11%, compared to Resident Schools Median at 35.22% <p>A7: The school’s percentage of LTELs is at a rate higher than the District average</p> <ul style="list-style-type: none"> Per CDE, MSA 4’s LTEL rate is at 11.3%, compared to the District average of 8.3% 	



A9: 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

- The school continues to use NWEA MAP to assess ELA and Math.
- Both 9 and 10 grade students, school-wide, experienced some growth from the Fall 2016 administration to the Spring 2017 administration of the assessment
 - 9th grade, in Reading, Mean RIT grew by 5.2 points and in Math by 8 points
 - 10th grade, in Reading, Mean RIT grew by 2.4 points and in Math by 2.1 points.
- Per responses to school leadership, the school continues to focus on improving student achievement via come of the following: MTSS/SSPT, CHATS Framework, SDAIE strategies, Power Math and English classes, teacher collaboration during professional development, Saturday School, after-school tutoring, and online platforms (Prodigy, Method Test Prep, ALEKS, Study Sync and Edualstic)

Corrective Action Required

None

Notes:

****NOTE: Upon the State Board of Education's finalization of California's School Dashboard, CSD will determine implications for the oversight report.***



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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.1) <input type="checkbox"/> Other: (Specify)

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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.2) <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"> Schoolwide ELA data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th 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 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median <input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.3) <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"> Schoolwide Math data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate higher than the Resident Schools Median <input checked="" type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th 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 3rd – 8th, 11th Grade on the SBAC in Math is significantly lower than the Resident Schools Median. <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.4) <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability <input type="checkbox"/> Other: (Specify)



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

<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"> English Learner reclassification rate for 2016-2017 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the District average <input type="checkbox"/> The school reclassifies English Learners at a rate equal to the District average <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the District average <input type="checkbox"/> The school does not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) (B2: 1.5) <input type="checkbox"/> CELDT Criterion reports (CDE) (B2: 1.5.1) <input type="checkbox"/> School internal reclassification data <input type="checkbox"/> Other: (Specify)

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

<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"> Providing supports for At-Risk English Learners 2016-2017 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate equal to the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> “At-Risk” by Grade report (CDE): 2016-2017 (B2: 1.6)



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"> • Providing supports for Long Term English Learners 2016-2017 (CDE) 	
Performance	Sources of Evidence
<p>Rubric</p> <p><input type="checkbox"/> The school’s percentage of LTELs is at rate lower than the District average</p> <p><input type="checkbox"/> The school’s percentage of LTELs is at a rate equal to the District average</p> <p><input checked="" type="checkbox"/> The school’s percentage of LTELs is at a rate higher than the District average</p> <p><input type="checkbox"/> The school’s percentage of LTELs is at a rate that is substantially higher than the District average</p> <p><input type="checkbox"/> No assessment of performance for this indicator</p>	<p><input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2016-2017) (B2: 1.6)</p>

A8: FOUR-YEAR 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"> • Four-Year Cohort Graduation Rate (CDE) (high schools only) 	
Performance	Sources of Evidence
<p>Rubric</p> <p><input checked="" type="checkbox"/> The school’s Four-Year Cohort Graduation Rate is at a rate higher than the District average</p> <p><input type="checkbox"/> The school’s Four-Year Cohort Graduation Rate is at a rate equal to the District average</p> <p><input type="checkbox"/> The school’s Four-Year Cohort Graduation Rate is at a rate lower than the District average</p> <p><input type="checkbox"/> The school’s Four-Year Cohort Graduation Rate is at a rate substantially lower than the District average</p> <p><input type="checkbox"/> No assessment of performance for this indicator</p>	<p><input checked="" type="checkbox"/> Four-Year Cohort Graduation Rate (CDE) (B2: 3.1)</p> <p><input type="checkbox"/> Other: (Specify)</p> <hr/> <p>List of the school’s A-G requirements (CSD internal use only)</p> <p>No “D” Policy. Must receive C or better to earn class credit. Each diploma has minimum requirements that meet and exceed the state graduation requirements and the “a-g” subject requirements of California’s four-year public universities.</p>



***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 data as measured by:

- The school's internal assessments (with analysis of results) by subgroups and grade-levels
- 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
- Results of internal assessments show growth in student achievement in ELA and Math

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. NWEA, DIBELS, or Stanford 10) and/or other assessment instruments for which the school can demonstrate validity/reliability.

	Rubric	Sources of Evidence
Performance	<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 checked="" 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. <input type="checkbox"/> The school has not collected and/or analyzed and monitored internal assessment or other academic achievement data	<input checked="" type="checkbox"/> Internal academic performance and progress data and information (B2: 2.1 – 2.6) <input type="checkbox"/> School Internal Assessment Data Report or equivalent <input type="checkbox"/> Other: (Specify)



CALIFORNIA SCHOOL DASHBOARD STATE PRIORITIES

Summary of School Performance

*Indicators A10-A19 reflect the school’s ratings on the Dashboard. For Indicators A10 –A19 the school’s ratings on the California School Dashboard will not impact the overall Student Achievement and Educational Performance Rating for 2017-2018 oversight but will provide informational areas of focus. California School Dashboard Indicators will figure into 2018-2019 oversight ratings.

Blue Green Yellow Orange Red

A10: Priority 4-3.1 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 English Language Arts

The school has achieved the performance level of **Orange**

A11: Priority 4-3.2 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 Mathematics

The school has achieved the performance level of **Red**

A12: Priority 4-3.5 Student Achievement English Learner Progress Indicator

The school has achieved the performance level of _____ N/A

A13: Priority 5-3.7 Student Engagement- Chronic Absenteeism Indicator

The school has achieved the performance level of _____ **7.9%, lower than LAUSD at 11.7%**

**this indicator will be available Fall 2018*

A14: Priority 6-3.8 School Climate- Suspension Rate Indicator

The school has achieved the performance level of **Blue**

A15: 2.5 Suspension and Expulsion Rates

The school has achieved the performance level of _____ N/A



HIGH SCHOOLS ONLY:

A16: Priority 4-3.3 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 English Language Arts

The school has achieved the following status Low and change Declined by -11.1 points

A17: Priority 4-3.4 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 Mathematics

The school has achieved the following status Very Low and change Declined Significantly by -17.4 points

A18: Priority 5-3.6 Student Engagement-Graduation Rate Indicator

The school has achieved the performance level of High at 90.9%, and Increase of +7.6%

A19: Priority 7 & 8-3.9 Access to and Outcomes in a Broad Course of Study-College/Career Indicator

The school has achieved the following status Medium

**this indicator will be available Fall 2017*

NOTES:

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

On November 7, 2017, the LAUSD Board of Education adopted by consent vote to renew Magnolia Charter Academy 4 (MSA4), to serve 360 students in grades 6-12, with Academic Benchmarks. MSA 4 must meet the following academic benchmarks during the 2018-2023 charter term as described below:

Academic Benchmarks:

The school shall provide an update to the Charter Schools Division no later than December 15th of each year of the charter term (after CAASPP (SBAC) scores have been released by the CDE).



- 1. The school will demonstrate at least one performance level growth per academic year, as reported on the California Dashboard, for numerically significant subgroups in ELA as measured by CAASPP (SBAC) Assessment at a rate equal to or greater than the Resident and Similar Schools Median, with the goal of achieving and maintain the “Green” performance level or higher.**
- 2. The school will demonstrate at least one performance level growth per academic year, as reported on the California Dashboard, for numerically significant subgroups in Math as measured by CAASPP (SBAC) Assessment at a rate equal to or greater than the Resident and Similar Schools Median, with the goal of achieving and maintain the “Green” performance level or higher.**



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<u>Areas of Demonstrated Strength and/or Progress</u>	
<p>O1: 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</p> <ul style="list-style-type: none"> As evidenced in Binder #3, the school also has a compliant Pupil Suicide Policy in place per AB2246 <p>O3: The school continues to implement grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS.</p> <ul style="list-style-type: none"> Per classroom observations and discussion with school leadership, there was evidence of students using “school wide vocabulary”, collaborative learning, and the use of technology. <p>O4: The school continues to implement and monitor 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"> Per discussion with school leadership, support in the form of a math coach was added this year to focus on lesson preparation, webinar trainings and team teaching. Additional support for math have come from outside trainings, such as the California Mathematics Council conference, and Magnolia Public Schools Symposiums. MyOn is a new reading comprehension program adopted this school year, per school leadership, to assist in the development of reading comprehension <p>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</p> <ul style="list-style-type: none"> Per discussion with leadership and a review the school’s website, MSA Bell has wide variety of information available, including but not limited to the following: Title IX information in accordance with SB1375, complaint procedures, and Suicide Prevention Policy. 	
<u>Areas Noted for Further Growth and/or Improvement</u>	
<p>Note: While the school has made progress in meeting the needs of all students, school leadership recognizes the need for improvement in both ELA and Math, per recent SBAC and internal MAP data (SEE STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE)</p>	
<u>Corrective Action Required</u>	
None	



Notes:

***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 (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 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
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Performance	<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) (B1: 10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3: 1.2) <input checked="" type="checkbox"/> Evacuation route maps (B3: 1.2) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3: 1.3) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3: 1.4) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3: 1.6) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3: 1.5 and B3A:4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3: 1.7 and B3A:4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2017-2018</i> (“ESSA Grid”) (B3A) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2

<p><i>The school has a system in place to ensure that:</i></p> <ul style="list-style-type: none"> • 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 for student immunization and health screening per applicable law and terms of the charter • school maintains an emergency epinephrine auto-injector (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen 	
Rubric	Sources of Evidence



Performance	<input 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 checked="" 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) (B1: 10) <input type="checkbox"/> Certificate of Occupancy or equivalent (B3: 1.1) <input checked="" type="checkbox"/> Evidence that school provides for student immunization and health screening (B3: 2.2) <input checked="" type="checkbox"/> Epi-pen documentation (B3: 2.3) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O3: STANDARDS-BASED INSTRUCTION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #3

<p><i>The school has:</i></p> <ul style="list-style-type: none"> implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), that are applicable to the grade levels served demonstrated evidence of transitioning to implementation of the California Next Generation Science Standards obtained WASC accreditation (high schools only) implemented a system to monitor student progress toward and completion of graduation and A-G requirements (high schools only) received UC/CSU approval of courses (UC Doorways) (high schools only) 	
Rubric	Sources of Evidence



Performance	<input 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 <input checked="" 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 <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 <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	<input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3: 3.1) <input type="checkbox"/> Evidence of transitioning to CA NGSS (B3:) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3: 3.3) *new schools only <input checked="" type="checkbox"/> WASC documentation (B3: 3.4) <input checked="" type="checkbox"/> UC Doorways course approval documentation (B3: 3.5) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3: 3.6) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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"> 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 disaggregates and analyzes data on a regular basis to address individual student needs implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD instruction, progress monitoring, assessment, and reclassification) has appointed a designee to assist and support foster youth 	
Rubric	Sources of Evidence



Performance	<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 (B3: 3.1) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 3.8) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3: 3.8) <input checked="" type="checkbox"/> Evidence of implementation of data analysis system program <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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>		
	Rubric	Sources of Evidence
Performance	<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 (B3: 3.7) <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3: 3.9) <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
Performance	<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) (B1: 10) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3: 3.8) <input checked="" type="checkbox"/> Self-Review Checklist (B3: 4.1) <input checked="" type="checkbox"/> Other special education documentation (B3: 4.1) <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 <input type="checkbox"/> Classroom observation (B3: 4.1) <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

	Rubric	Sources of Evidence



Performance	<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) (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3: 4.2) <input checked="" type="checkbox"/> Evidence of data monitoring (B3: 4.2) <input checked="" type="checkbox"/> LAUSD suspension and expulsion data reports <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates
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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p><i>The school:</i></p> <ul style="list-style-type: none"> • 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 • provides faculty and other instructional staff with professional development opportunities to improve instructional practice • provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 	
Rubric	Sources of Evidence



Performance	<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 (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9

<p><i>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</i></p> <ul style="list-style-type: none"> engages in communication that notifies parents 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 (e.g., parents/guardians, students, and teachers) 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 	
Rubric	Sources of Evidence
<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 checked="" type="checkbox"/> Parent-Student Handbook (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3: 4.3) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3: 4.3)



Performance	<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"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3: 4.3) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3: 4.3) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3: 4.3) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3: 4.3) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- complaint procedures**
- Title IX information in accordance with SB1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)**
- Applicable categories described in Charter School Transparency Resolution

**required on website

Rubric	Sources of Evidence
<input 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 checked="" 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 (B3:4.4) for: <ul style="list-style-type: none"> • SB 1375 Information • UCP Procedure and Forms • Complaint Forms • AB2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics



	<ul style="list-style-type: none"> • Student Achievement Information
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O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11

The school has a system in place for the evaluation of school staff designed to ensure that:

- the school’s educational program yields high student achievement
- the school complies with all applicable legal requirements

	Rubric	Sources of Evidence
Performance	<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"/> Evidence of staff evaluation system (B3: 4.5) <input 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
Performance	<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 2017-2018</i> form (“ESSA Grid”) (B3A: 1.1) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A: 1.2 – 1.4) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A: 1.5) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A: 2 & 3) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A) <input checked="" type="checkbox"/> Vendor certifications (B3A: 4) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A: 5) <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):



8011 Magnolia Science Academy 4	2014-15					2015-16					2016-17				
	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		21,493	232,553	352,619	352,618		454,221	431,925	493,669	494,503		495,984	601,711	776,350	776,350
Current Assets		394,884	492,451	519,873	519,870		664,221	607,889	893,664	902,173		1,068,476	1,039,109	1,214,674	1,215,177
Fixed and Other Assets		19,860	19,860	24,313	26,333		15,279	17,112	64,144	64,144		48,488	48,486	53,729	53,730
Total Assets		414,744	512,311	544,186	548,203		679,500	625,001	957,808	966,317		1,116,964	1,087,595	1,268,403	1,268,907
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		45,000	82,074	42,035	79,383		5,735	76,660	187,705	303,827		187,420	177,921	232,885	238,748
Long Term Liabilities		0	0	0	0		0	0	6,462	0		0	6,500	0	0
Total Liabilities		45,000	82,074	42,035	79,383		5,735	76,660	194,167	303,827		187,420	184,421	232,885	238,748
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		369,744	430,237	502,151	466,820		673,765	548,341	763,641	662,490		929,544	903,174	1,035,518	1,030,159
Total Revenues	1,808,719	1,996,444	2,138,452	2,079,028	2,112,262	2,062,124	2,135,847	2,188,831	2,235,710	2,280,876	2,189,203	2,379,292	2,383,802	2,361,237	2,427,635
Total Expenditures	1,792,886	1,865,623	1,946,807	1,815,469	1,884,034	2,003,700	1,964,233	2,107,310	1,938,889	2,085,206	1,992,237	2,112,238	2,143,118	1,988,209	2,059,966
Net Income / (Loss)	15,833	130,821	191,645	263,559	228,228	58,424	171,614	81,521	296,821	195,670	196,966	267,054	240,684	373,028	367,669
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
Inc / (Dec) in Net Assets	15,833	130,821	191,645	263,559	228,228	58,424	171,614	81,521	296,821	195,670	196,966	267,054	240,684	373,028	367,669
Net Assets, Beginning	33,767	238,923	238,923	238,923	238,592	430,237	502,151	502,151	502,151	466,820	548,341	763,641	763,641	763,641	662,490
Adj. for restatement / Prior Yr Adj	0	0	(331)	(331)	0	0	0	(35,331)	(35,331)	0	0	(101,151)	(101,151)	(101,151)	0
Net Assets, Beginning, Adjusted	33,767	238,923	238,592	238,592	238,592	430,237	502,151	466,820	466,820	466,820	548,341	662,490	662,490	662,490	662,490
Net Assets, End	49,590	369,744	430,237	502,151	466,820	488,661	673,765	548,341	763,641	662,490	745,307	929,544	903,174	1,035,518	1,030,159

8011 Magnolia Science Academy 4	Audited Financials					2017-18				
	2013-14	2014-15	2015-16	2016-17	2017-18	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	102,651	352,618	494,503	776,350	0		648,571	0	0	0
Current Assets	308,982	519,870	902,173	1,215,177	0		1,102,995	0	0	0
Fixed and Other Assets	5,734	26,333	64,144	53,730	0		106,137	0	0	0
Total Assets	314,716	546,203	966,317	1,268,907	0		1,209,132	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	76,124	79,383	303,827	238,748	0		113,923	0	0	0
Long Term Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	76,124	79,383	303,827	238,748	0		113,923	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Net Assets	238,592	466,820	662,490	1,030,159	0		1,095,210	0	0	0
Total Revenues	1,697,277	2,112,262	2,280,876	2,427,635	0	2,315,274	2,160,715	0	0	0
Total Expenditures	1,418,260	1,884,034	2,085,206	2,059,966	0	2,202,177	2,101,023	0	0	0
Net Income / (Loss)	279,017	228,228	195,670	367,669	0	113,097	59,692	0	0	0
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
Inc / (Dec) in Net Assets	279,017	228,228	195,670	367,669	0	113,097	59,692	0	0	0
Net Assets, Beginning	(40,425)	238,592	466,820	662,490	0	903,173	1,035,518	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	(40,425)	238,592	466,820	662,490	0	903,173	1,035,518	0	0	0
Net Assets, End	238,592	466,820	662,490	1,030,159	0	1,016,271	1,095,210	0	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p>	3
<p>Magnolia Science Academy 4’s (MSA 4) fiscal condition is strong and has been upward trending since the 2013-2014 fiscal year. According to the 2016-2017 independent audit report, the school had positive net assets of \$1,030,159 and net income of \$367,669. The 2017-2018 First Interim projects positive net assets of \$1,089,851 and net income of \$59,692.</p> <p>According to the 2016-2017 independent audit report, Magnolia Science Academy 4 is one of 10 schools operated by Magnolia Educational & Research Foundation (MERF). MERF currently has five 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 \$21,478,410 and net income of \$616,950. MERF, without the charter schools, reported negative net assets of (\$766,778) and a net loss of (\$793,576), which was the result of a negative equity transfer of (\$768,450) to MERF and asset write-offs of (\$348,866) absorbed by MERF in light of the closure of MSA Santa Clara (a non-LAUSD authorized MERF school). MERF’s 2016-2017 independent audit report (in Note 17), states: “On July 1, 2016, the Board of MERF voted to close MSA Santa Clara, and to transfer the June 30, 2016 operating deficit of (\$731,580) to MERF. MSA Santa Clara also had an additional loss during 2016-2017 in the amount of (\$36,870) for miscellaneous revenues repaid and expenses directly related to final settlement of MSA Santa Clara for a total deficit of (\$768,450).” MERF’s 2016-2017 independent audit report also describes the absorption of MSA Santa Clara’s remaining assets and liabilities assumed by MERF resulted as an extraordinary item that led to write-offs of accounts receivable and fixed assets in the amount of (\$348,866).</p> <p>According to MERF, in 2016-2017, MSA 4 paid annual management fees of \$90,995 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>	



Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition is strong.

	2013-2014 (Audited Actuals)	2014-2015 (Audited Actuals)	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (First Interim)
Net Assets	\$238,592	\$466,820	\$662,490	\$1,030,159	\$1,089,851
Net Income/Loss	\$279,017	\$228,228	\$195,670	\$367,669	\$59,692
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0

2. March 2015 Settlement Agreement Status

On or about March 20, 2015, LAUSD and MERF entered into a Settlement Agreement, whereby the parties agreed to resolve a lawsuit filed by MERF when the District rescinded the conditional renewals of Magnolia Science Academy 6, 7, and 8. The terms and conditions set forth in Paragraph 8 of the Settlement Agreement stated: “MERF agrees to be subject to fiscal oversight during fiscal year 2015-16 by the Fiscal Crisis & Management Assistance Team (FCMAT), or a reasonably equivalent fiscal organization, which would oversee MERF’s fiscal operations.” ***Please refer to Item 22 of the Notes section for further details.***

As part of the renewal process for Magnolia Science Academy 4 (MSA 4) and Magnolia Science Academy 5 (MSA 5), in November 2017, MERF provided the final management letter from FCMAT (dated August 25, 2017), and the first two management letters from the School Services of California (SSC) team (dated August 25, 2017, and October 16, 2017, respectively). MSA 4 was approved by the LAUSD Board of Education with fiscal benchmarks, including extended oversight by SSC. Based on the December 4, 2017 amended oversight service agreement between School Services and MERF, SSC’s original scope of work for its oversight review was extended to cover the months of January 2018 through April 2018, with field work and management letters addressing SSC’s review for these four months slated for completion by June 30, 2018. Based on the January 9, 2018 email confirmation between SSC and the Charter Schools Division (CSD), it was agreed that SSC’s extended four-month review would cover a sample of financial transactions for MSA 4, 6, 7 and 8 (the current LAUSD-authorized MERF charter schools, with the exception of MSA 5). MSA 5’s charter



renewal was denied by the LAUSD Board of Education on November 7, 2017 (based on the school’s academic performance), but was subsequently approved by the Los Angeles County Office of Education (LACOE).

Based on the CSD’s 2017-2018 oversight visit and review of a sample of check disbursements and credit card transactions, the CSD noted that MERF had made significant improvements in its accounting and fiscal practices (based on FCMAT’s and SSC’s recommendations), including its implementation of an enhanced, customized software system (i.e., COOLSIS). Benefits of MERF’s improved system include: 1) MERF’s Board-approved budgets are uploaded to the purchasing software and are now part of the purchasing and payment approval process; 2) Purchase requisitions, purchase orders, and purchase approvals are now managed within the COOLSIS system; and, 3) Vendor information and resource codes are now system-required before MERF sends any request for approval. Although the CSD did note discrepancies through its review of a sample of check disbursements and credit card transactions, these discrepancies occurred prior to MERF’s implementation of its enhanced COOLSIS system (which commenced in approximately October 2017). The discrepancies in question are detailed in the “**Areas Noted for Further Growth and/or Improvement**” section below.

In summary, the CSD recognizes the progress made by MERF towards fulfilling the fiscal oversight requirements set forth in Paragraph 8 of the March 2015 Settlement Agreement (i.e., since the 2016-2017 oversight visit). The CSD will continue to monitor SSC’s findings and recommendations for the prescribed four-month period spanning from January 2018 through April 2018. Furthermore, the CSD will continue to monitor MERF’s compliance with fiscal oversight by SSC and MERF’s progress in remedying the findings from SSC through oversight.

Areas Noted for Further Growth and/or Improvement:

Through conducting fiscal oversight and analyzing the data below, the Charter Schools Division requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the five MERF charter schools that are currently authorized by LAUSD. The Charter Schools Division reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with MERF’s Magnolia Public Schools Financial Policies and Procedures Manual (P’s & P’s). 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 in each charter school’s Annual Performance-Based Oversight Visit Report, with the exception of the fiscal condition and/or the segregation of duties reviews, which are school-specific and reviewed separately for each MERF charter school.

1. Bank Reconciliation Reports

Page 1 of the CSH107 Bank Account Reconciliations provides guidance concerning bank account reconciliations.

The policy reads: “**Responsibilities:** Chief Financial Officer [CFO] or designee is responsible for review and approval of all reconciliations.” “**Bank Statement Preparation:** After receipt of the monthly bank statement and/or online printing of the monthly bank statement, Back-office accountant should prepare the monthly bank reconciliation by the 20th of the following month.”



Based on the CSD’s review of the bank statements and bank reconciliation reports for the months of July 2017 through December 2017, it was noted that the bank reconciliation reports showed no evidence of reviews or approvals by MERF’s CFO or designee. Further, the preparation and review/approval dates of the bank reconciliation reports were also omitted, hence, the CSD’s assessment regarding the school’s timely preparation/review of the reports could not be determined. In addition, the CSD noted that FCMAT, per its August 25, 2017 management letter, made a recommendation related to “Bank Statements and Reconciliations,” which states: “Include the signatures of the individual who prepared the bank statement reconciliation and the individual who reviewed/approved it, and the respective dates of same, on the reconciliation documents.”

As a result of the above observation, MERF’s CFO advised the CSD that MERF’s Senior Financial Analyst reviews the monthly bank reconciliation reports via email. Further, effective immediately and moving forward, MERF declared that it would implement a means of documenting the signatures of the bank reconciliation report reviewers and the report review dates.

2. Credit Cards

Page 2 of the CSH111 CREDIT CARDS AND DEBIT CARDS section states: “It is the policy of the Organization to provide credit cards to authorized members of the Organization staff in the performance of their duties and responsibilities.”

Based on the CSD’s review of a sample credit card statements and supporting documentation, the CSD noted that the credit card accounts for three of the five LAUSD-authorized Magnolia charter schools (i.e., MSA 4, 7 and 8), were all assigned to the former MERF CFO (who left the organization in November 2016). However, these accounts remained active until February 5, 2018. The CSD also noted that some of the aforementioned former MERF CFO’s credit card accounts continued to incur charges and/or delinquent fees. In addition, the former MERF CFO’s credit card account with MSA 8 incurred fraudulent charges in August 2017. MERF confirmed that refunds of all fraudulent charges had been received by MERF as of the date of this report, and, as of February 5, 2018, all credit card accounts under the former CFO’s name had officially been closed.

The CSD recommends that the school and MERF ensure that all credit card transactions are monitored and reviewed timely. Further, in the event that the credit card holder is no longer working for the organization, the CSD recommends that MERF ensure that any automatic payments are stopped, all credit card balances are paid in full, and all credit card accounts associated with former members of the organization are closed immediately, to prevent potential fraudulent transactions, late fees, and/or finance charges to these credit cards.

The CSD will continue to monitor these issues through oversight.

3. Automated Clearing House (ACH)/Recurring Automatic Payments

Based on the CSD’s review of a sample bank statements and supporting documentation, it was noted that two ACH transactions for Ready Refresh, listed below, included late fees in the amount of \$10, pertaining to invoices for the months of February 2017 and March 2017 for MSA 4 and MSA 6. The table below also illustrates the ACH transactions by MERF for recurring automatic



payments. However, MERF’s Magnolia Public Schools Financial Policies and Procedures Manual makes no reference to ACH and recurring automatic payment processes.

The CSD recommends that MERF update its P’s & P’s to provide guidance in this area, including clarification regarding permissible recurring payments, and delineate the approval and review processes pertaining to ACH transactions and recurring automatic payments.

Date	Vendor	Check Number	Description	Check Amount	School
4/3/2017	Ready Refresh	DB040317-1	DB040317-1; Ready Refresh	\$ 1,023.23	MSA 4
4/5/2017	Ready Refresh	DB040517	DB040517; Ready Refresh	\$ 439.69	MSA 6
9/25/2017	Arc Inc.	82720	ASES Grant October 2017	\$ 30,000.00	MSA 8

Other Observations:

1. During the 2017-2018 fiscal oversight process, the CSD noted instances whereby MERF did not respond or provide documentation/information pertaining to the CSD’s requests within the CSD’s stated deadlines. Education Code section 47604.3 requires that charters “promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding financial records, from its chartering authority.” Failure to timely respond to the CSD’s requests or inquiries constitutes a violation of the terms of the charter with LAUSD, as well as applicable state law and, in this instance, may impact the school’s 2018-2019 fiscal rating.

The CSD communicated with MERF’s CFO (initially via telephone, and again, via email, on 3/14/2018), regarding MERF’s need to improve the timeliness of its responses to the CSD. MERF’s CFO indicated that she and the MERF team would work on meeting the CSD’s deadlines so that timeliness would not continue to be an issue. The CSD will continue to monitor this issue through oversight.

Date	Email or Phone Correspondence (sent by the CSD staff)	Email Recipients	Email Copied to	Comments
02/16/18	CSD – sent an email requesting written responses from the CFO, due COB 02/23/18.	CFO	Senior Financial Analysts, FOA	



02/27/18	CSD - sent follow-up email with a new deadline of 03/01/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	The CSD sent a reminder for documentation not provided, that was originally due on 02/23/18.
03/01/18	CSD – sent email requesting a copy of MERF’s 2016-2017 Audited Financial Report, due COB 03/02/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	
03/05/18	CSD - sent email requesting a phone call with the CFO.	CFO, Senior Financial Analyst	Senior Financial Analysts, FOA	The CSD communicated the need for a phone call to clarify additional questions.
03/06/18	CSD – sent email, once again requesting a conference call with the CFO, and reminding MERF of previous request with a due date of COB 03/02/18.	Senior Financial Analyst	CFO, Senior Financial Analyst; EdTec	The CSD communicated a new timeline of 03-07-18 by 12:00 noon.
03/09/18	CSD – sent a follow-up email communicating the need to connect with the CFO to finalize oversight report.	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	On 03/09/18, the CSD received a voice message from the CFO following up on the prior request due on 03-07-18.

2. Based on the CSD’s review of a sample check disbursements, the CSD noted the instances listed in the table below, whereby the documentation provided did not contain itemized receipts for the related purchases, even though the reimbursements were supported by other documentation. The CSD recommends that, consistent with recommended industry practices (as referenced in the 2017 California Charter School Accounting and Best Practices Manual published by FCMAT), MERF update its fiscal policies and procedures to require original, detailed receipts for all purchases made via check disbursements or credit cards. In addition, the CSD noted that, per FCMAT’s August 25, 2017 management letter, FCMAT made the following recommendations related to “Accounts Payable,” which states: “1) Pay invoices timely and 2) Require itemized receipts for transactions.”

Date	Vendor	Check Number	Description	Check Amount	School
11/21/2016	Brad M.	52267	Reimb: El Pollo Loco Lunch for Staff	\$ 324.16	MSA 5
5/19/2017	Frances T. Cameron	82630	Reimb: Mileage & Dinner	\$ 172.41	MSA 8

3. Based on the CSD’s review of the MERF Board meeting minutes, and per confirmation received from the Sr. Financial Analyst of MERF, the CSD noted that the governing board meeting minutes provided by MERF did not evidence its receipt, review, and discussion of the CSD’s 2016-2017 Annual Performance-Based Oversight Visit reports (please refer to Item 14 in the Notes section below). The CSD recommends that, beginning in 2017-2018, MERF present and discuss the CSD’s Annual Performance-Based



<p>Oversight Reports with its governing board, and document said discussion regarding same. This is one of the required fiscal items in the CSD’s Annual Performance-Based Oversight Visit Preparation Guide, beginning in 2017-2018.</p> <p>The recommended actions and/or the specific fiscal policies and procedures referenced in the “Other Observations” section of this report will be reviewed by the Charter Schools Division as part of the next oversight visit. The observed results may be factored into the school’s rating for next year.</p>	
<p>Corrective Action Required:</p> <p>The governing board and leadership team of the charter school are responsible for managing the day-to-day operations of the school. Thus, the CSD’s recommendations concerning the above-noted findings and observations should be discussed at MERF’s next board meeting, but, in any event, no later than 60 days following the school’s receipt of this report. After the schools’ 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 staff will continue to monitor these issues through oversight.</p>	

**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2017 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 July 2017 through December 2017. Selected the months of July 2017 through December 2017 for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. Citi Bank – 5041 MSA Bell (Checking)
 - b. Citi Bank – 6769 MSA 4 (Checking)
 - c. Citi Bank – 6694 MSA 5 (Checking)
 - d. Citi Bank – 6121 MSA 6 (Checking)
 - e. Citi Bank – 2703 MSA 7 (Checking)
3. Reviewed credit card statements from May 2017 through October 2017 for all the credit card accounts below (except for the statements related to the accounts in the name of the former CFO as specified below). Selected the months of January 2017 through October 2017, where applicable, for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. American Express, credit card ending in 1003 (Former CFO – MSA 4) - January 2017 through July 2017
 - b. American Express, credit card ending in 1004 (CFO – MSA 4)
 - c. American Express, credit card ending in 1002 (CFO – MSA 5)
 - d. American Express, credit card ending in 1000 (CFO – MSA 6)
 - e. American Express, credit card ending in 1005 (Former CFO – MSA 7) - January 2017 through October 2017
 - f. American Express, credit card ending in 1007 (CFO – MSA 7)
 - g. American Express, credit card ending in 1000 (Former CFO – MSA 8) - January 2017 through May 2017, and August 2017 through October 2017
 - h. American Express, credit card ending in 1006 (CFO – MSA 8)
4. Reviewed the following 39 checks/debit transactions. Discrepancies were noted for further growth and/or improvement above.
 - a. Check numbers: 42338, 62329, 52267, 52273, DB120916, 42357, 82525, 52290, 72610, 82535, 42385, 82554, 82571, 62400, 82585, 52328, DB040317-1, 72722, 52346, 72741, 82630, 42454, 62472, 42467, 72780, 62471, 82663, 72801, 72803, 62496, DB062817, 42499, 52421, 82720, 52445, 42548, 82752, DB111417 and 82755.
5. Per the 2016-2017 audit report, the school's cash and cash equivalents is \$776,350, and total expenditures equal \$2,059,966. Therefore, the school's cash reserve level is 37.6%, 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 Bell and MSA 6. No discrepancies were noted.
8. MSA 4 did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
9. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
10. Governing board meeting minutes reflecting the adoption of the 2017-2018 budget were provided.



11. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
12. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
13. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
14. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were *not* provided. See the CSD's recommendation in the "Other Observations" section above.
15. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
16. Governing board meeting minutes reflecting the discussion of the most current independent audit report and resolution of any audit findings, including material weaknesses, or deficiencies were provided.
17. Evidence of MSA 4 offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
18. Equipment inventory was provided.
19. The 2017-2018 LCAP was submitted to LAUSD.
20. The EPA allocation and expenditures are posted on the charter school's website.
21. The 2016-2017 audited and unaudited actuals nearly mirror each other.
22. March 2015 Settlement Agreement (further details related to Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above):

Pursuant to the March 2015 Settlement Agreement, MERF entered a study agreement with FCMAT to review a sample of financial transactions for all eight Magnolia schools then-authorized by LAUSD, for the 12-month period spanning from July 2015 through June 2016. Given the significant delays by MERF, FCMAT was unable to perform its obligations, and documented such to MERF and LAUSD in its management letters issued during 2015-2016. On August 3, 2016, FCMAT entered into an Amended Study Agreement with MERF (at MERF's request). The Amended Study Agreement's scope of work was truncated to include a review of July 2015 (for all eight Magnolia schools then-authorized by LAUSD), followed by reviews consisting of a sampling of financial transactions and reports for August 2015, May 2016 and June 2016 (for MSA 6, MSA 7, and MSA 8 only).

Due to MERF's failure to timely respond to FCMAT's document requests and other significant reasons stated in the findings of fact in support of denial of the renewal charter petition, the LAUSD Board of Education approved the CSD's denial recommendations for MSA 1, MSA 2, and MSA 3 on October 18, 2016. MSA 1, 2 and 3 were subsequently approved by LACOE.

In response to the CSD's request pertaining to MERF in March 2017, FCMAT indicated that it was unable to move forward with a study agreement for the review and testing of MERF schools' 2016-2017 financial transactions. As such, the CSD subsequently concurred (on May 15, 2017) with the proposal that School Services of California be contracted by MERF to continue the fiscal oversight started by FCMAT.

See the current status on MERF's compliance with the March 2015 Settlement Agreement under Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 4

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 3/6/2018

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

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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><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The two most current audits show no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other. 	<p><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The most current audit shows no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school generally adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other.



<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>15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement</p> <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> o Most current financial reports presented to the governing board o Employee handbook o Student handbook o Salary schedules/benefits/information o Budget development process o Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location o The most current approved petition o Administration/school contact o School calendar o Enrollment policies and procedures o Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <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> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> o Most current financial reports presented to the governing board o Employee handbook o Student handbook o Salaries schedule/benefits/information o Budget development process o Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location o The most current approved petition o Administration/school contact o School calendar o Enrollment policies and procedures o Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Existing Schools (based on the most current audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 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); 2. All vendors and staff are paid in a timely manner; 3. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 4. Governing board adopts the annual budget; 5. The EPA allocation and expenditures are posted on the charter school’s website; 6. The LCAP is submitted to the appropriate agencies; 7. Have an audit conducted annually by an independent auditing firm; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; and 9. There is no apparent conflict of interest. <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The cash balance at the beginning of the school year is positive; 2. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 3. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 	<p><u>Existing Schools (based on the most current audit):</u> 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>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<ol style="list-style-type: none"> 4. 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; 5. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 6. Current audit shows no material weaknesses, deficiencies and/or findings; 7. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 8. Governing board approves any amendment(s) to the charter school’s budget; and 9. Governing board approved LCAP is posted on the charter school’s website. <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>



<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>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division. 2. 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. 3. 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. 4. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues c. Projected expenses and revenues have no significant variance from budget 5. As a practice, the governing board receives and reviews the charter school's financial reports as evidenced by the governing board meeting minutes. 6. The LCAP is submitted to the appropriate agencies. 7. The EPA allocation and expenditures are posted on the charter school's website, if applicable. <p><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>New Schools:</u></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><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



LOS ANGELES UNIFIED SCHOOL DISTRICT **CHARTER SCHOOLS DIVISION**

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT **2017-2018 SCHOOL YEAR**

MAGNOLIA SCIENCE ACADEMY 5 - MSA5 8012

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 Name:		Magnolia Science Academy 5 (MSA5)			Location Code:	8012
Current Address:		City:	ZIP Code:	Phone:	Fax:	
8230 Kittridge Street		Reseda, CA	91335	818-705-5676	818-705-5627	
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2013 to June 30, 2018			6	Northeast		
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:	
209		460	6-10		6-12	
Total Number of Staff Members:		Certificated:	Classified:			
19		12	7			
Charter School's Leadership Team Members:		Brad Plonka and Ali Kaplan				
Charter School's Contact for Special Education:		Elaine Nardini				
CSD Assigned Administrator:		CSD Fiscal Services Manager:				
Aida Tatiossian		Lourdes Echavarria				
Other School/CSD Team Members:		Helena Yoon-Fontamillas				
Oversight Visit Date:		Fiscal Review Date (if different):				
February 21, 2018		February 1, 2018				
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):		LAUSD Co-Location Campus (if applicable):		Reseda High School		
Yes		DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:		5-23-17		

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
3	3	3	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. 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 2017-2018*. 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	3

Areas of Demonstrated Strength and/or Progress

G1: 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)

- As evidenced in Binder #1, there is evaluation protocol that details how and when school leaders are evaluated. Additionally, it measures school leaders using the California Professional Standards for Education Leaders (CPSELs)
- While there is evidence of a Superintendent Performance Evaluation Form, it recommended that the Magnolia Public School (MPS) Board create an evaluation protocol for the CEO/Superintendent of MPS.

G4: 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 as evidenced by reviewing MPS board meeting minutes and agendas, as well as the ESSA Grids at school sites.

G5: The Governing Board monitors school performance and other internal data to inform decision-making

- As evidenced in Board meeting agendas, minutes, and Academic Committee meeting minutes, academic “Glows, Grows and Next Steps” are discussed to inform decisions regarding each MPS school’s academic trajectory

Areas Noted for Further Growth and/or Improvement

None noted at the time of this report

Corrective Action Required

None

Notes:

Notes:

Other: The Magnolia Public Schools governing board is encouraged to continue discussions and supports at the school site level in the incorporation of STEM, STEAM, or STREAM within different content areas and classrooms.

UPDATE regarding the Settlement Agreement with LAUSD: Magnolia Education and Research Foundation (MERF) and School Services California executed an amendment to the original contract on 12/12/17 to extend the oversight services through July 31, 2018. This amendment



extended the scope of work to cover the months of January through April 2018, with field work and management letters addressing these four months by June 30, 2018.

The Charter School Division will continue to monitor MERF's compliance of the fiscal oversight provision required in the March 2015 Settlement Agreement between LAUSD and MERF through the end of MSA 5's current charter term.

On 11/7/17 the LAUSD BOE voted on non-renewal for MSA 5.
All details are delineated in the Findings of Fact BOE Report #179-17/18.

****NOTE: 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.***



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"> Governing Board (composition, structure, roles and responsibilities) committees/councils, including but not limited to those mandated by laws or regulations evaluation of school's executive level leadership 		
Performance	Rubric	Sources of Evidence
	<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 (B1: 1) <input checked="" type="checkbox"/> Bylaws (B1: 2) <input checked="" type="checkbox"/> Board member roster (B1: 3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars and agendas <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1: 7) <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"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act 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 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 		
Performance	Rubric	Sources of Evidence



Performance	<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 and minutes (B1: 4) <input checked="" type="checkbox"/> Board meeting calendar (B1: 5) <input checked="" type="checkbox"/> Brown Act training documentation (B1: 8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1: 9) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
Performance	<input 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 checked="" 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 (B1: 4) <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1: 10) <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation (B1: 11) <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) (B1: 12) <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process (B1: 13.1) <input checked="" 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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements (B1: 13.2) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <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:</i>		
<ul style="list-style-type: none"> 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 ongoing monitoring of the school’s implementation of its LCAP action plans and progress toward LCAP goals 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board regularly 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 (B1: 4) <input checked="" type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making (B1: 14) <input checked="" type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)
	<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	

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"> The school is fiscally strong and net assets are positive in the prior two independent audit reports. 		
Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports	<input type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)
	<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 and net assets are negative in the most current independent audit report, or 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 and net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division	



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.

	Rubric	Sources of Evidence
Performance	<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, or 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, or 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 (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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

N/A



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p>A5: ENGLISH LEARNER RECLASSIFICATION The school reclassifies English Learners at a rate higher than the District average</p> <ul style="list-style-type: none"> • The school’s 2016-17 reclassification rate of 19.5% is higher than the District average of 16.8% <p>A6: “AT RISK” ENGLISH LEARNERS The school’s percentage of “At Risk” English Learners is at rate lower than the District average</p> <ul style="list-style-type: none"> • The school’s 2016-17 percentage of EL students at risk of becoming Long-term English Learners of 0.8% is lower than the District average of 5.9%. <p>A9: INTERNAL ASSESSMENT (Grades 9 and 10) 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.</p> <ul style="list-style-type: none"> • The school use the following internal assessments to measure student achievement in ELA and Math for grades 6-10: MAP Growth (NWEA) • From Fall 2016 to Fall 2017, 9th grade students demonstrated growth in Math from 209.2 to 220.1 points (Mean RIT) • From Fall 2016 to Fall 2017, 10th grade students made a slight decline in Math from 226.2 to 224.9 (Mean RIT) • From Fall 2016 to Fall 2017, 9th grade students demonstrated growth in ELA from 210.4 to 216.7 points (Mean RIT) • From Fall 2016 to Fall 2017, 10th grade students demonstrated growth from 218.9 to 219.7 (Mean RIT) • Overall, students’ projected growth levels are exceeding by 6-7 points, which is higher than the expected growth levels of NWEA, which are typically 3-4 points. 	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p>	
<p>A1: SBAC SUBGROUP ELA One subgroup (Students with Disabilities) demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17</p> <ul style="list-style-type: none"> • English Learner students decreased from 9.00% to 5.71% • Latino students decreased from 37.00% to 29.17% • Socioeconomically Disadvantaged students decreased from 40.00% to 33.55% 	
<p>A2: SBAC SUBGROUP MATH Some subgroups (Latino and SED) demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17</p> <ul style="list-style-type: none"> • English Learner students decreased from 6.00% to 2.86%. • Students with Disabilities remained the same from 0.0% to 0.0% 	



A3: SBAC SCHOOLWIDE ELA

The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median

- Review of 2016-17 SBAC results indicates that the school’s percentage of students who Met or Exceeded standards in ELA at 33.33% is lower than the Resident Schools median of 40.07%.

A4: SBAC SCHOOLWIDE MATH

The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate lower than the Resident Schools Median

- Review of 2016-17 SBAC results indicates that the school’s percentage of students who Met or Exceeded standards in Math at 15.61% is lower than the Resident Schools median of 21.64%.

A7: LONG TERM ENGLISH LEARNERS (LTELs) - (SECONDARY SCHOOLS)

The school’s percentage of LTELs is at a rate higher than the District average

- The school’s 2016-17 percentage of Long-term English Learners of 14.2% is higher than the District average of 8.3%.

Corrective Action Required

None

Notes:

None

**NOTE: Upon the State Board of Education’s finalization of California’s School Dashboard, CSD will determine implications for the oversight report.*



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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.1) <input type="checkbox"/> Other: (Specify)

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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.2) <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"> Schoolwide ELA data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate equal to the Resident Schools Median <input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th 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) (B2: 1.3) <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"> Schoolwide Math data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate equal to the Resident Schools Median <input checked="" type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th 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) (B2: 1.4) <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability <input type="checkbox"/> Other: (Specify)



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

<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"> English Learner reclassification rate for 2016-2017 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the District average <input type="checkbox"/> The school reclassifies English Learners at a rate equal to the District average <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the District average <input type="checkbox"/> The school does not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) (B2: 1.5) <input type="checkbox"/> CELDT Criterion reports (CDE) (B2: 1.5.1) <input type="checkbox"/> School internal reclassification data <input type="checkbox"/> Other: (Specify)

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

<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"> Providing supports for At-Risk English Learners 2016-2017 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school's percentage of "At Risk" English Learners is at rate lower than the District average <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate equal to the District average <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate higher than the District average <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> "At-Risk" by Grade report (CDE): 2016-2017 (B2: 1.6)



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"> • Providing supports for Long Term English Learners 2016-2017 (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school's percentage of LTELs is at rate lower than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate equal to the District average <input checked="" type="checkbox"/> The school's percentage of LTELs is at a rate higher than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2016-2017) (B2: 1.6)

A8: FOUR-YEAR 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"> • Four-Year Cohort Graduation Rate (CDE) (high schools only) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate higher than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate equal to the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate lower than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate substantially lower than the District average <input checked="" type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input type="checkbox"/> Four-Year Cohort Graduation Rate (CDE) (B2: 3.1) <input type="checkbox"/> Other: (Specify) <hr/> <p>List of the school's A-G requirements (CSD internal use only)</p>

***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 data as measured by:

- The school’s internal assessments (with analysis of results) by subgroups and grade-levels
- 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
- Results of internal assessments show growth in student achievement in ELA and Math

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. NWEA, DIBELS, or Stanford 10) and/or other assessment instruments for which the school can demonstrate validity/reliability.

Rubric		Sources of Evidence
Performance	<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 checked="" 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. <input type="checkbox"/> The school has not collected and/or analyzed and monitored internal assessment or other academic achievement data	<input checked="" type="checkbox"/> Internal academic performance and progress data and information (B2: 2.1 – 2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report or equivalent <input type="checkbox"/> Other: (Specify)



CALIFORNIA SCHOOL DASHBOARD STATE PRIORITIES

Summary of School Performance

*Indicators A10-A19 reflect the school’s ratings on the Dashboard. For Indicators A10 –A19 the school’s ratings on the California School Dashboard will not impact the overall Student Achievement and Educational Performance Rating for 2017-2018 oversight but will provide informational areas of focus. California School Dashboard Indicators will figure into 2018-2019 oversight ratings.

Blue Green Yellow Orange Red

A10: Priority 4-3.1 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 English Language Arts

The school has achieved the performance level of ORANGE

A11: Priority 4-3.2 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 Mathematics

The school has achieved the performance level of ORANGE

A12: Priority 4-3.5 Student Achievement English Learner Progress Indicator

The school has achieved the performance level of GREEN

A13: Priority 5-3.7 Student Engagement- Chronic Absenteeism Indicator

The school has achieved the performance level of _____

**this indicator will be available Fall 2018*

A14: Priority 6-3.8 School Climate- Suspension Rate Indicator

The school has achieved the performance level of BLUE

A15: 2.5 Suspension and Expulsion Rates

The school has achieved the performance level of N/A



HIGH SCHOOLS ONLY:

A16: Priority 4-3.3 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 English Language Arts

The school has achieved the following status _____ and change _____

A17: Priority 4-3.4 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 Mathematics

The school has achieved the following status _____ and change _____

A18: Priority 5-3.6 Student Engagement-Graduation Rate Indicator

The school has achieved the performance level of _____

A19: Priority 7 & 8-3.9 Access to and Outcomes in a Broad Course of Study-College/Career Indicator

The school has achieved the following status _____

**this indicator will be available Fall 2017*

NOTES:

The school will have grade 11 in the 2019-2020 school year.

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

N/A



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p>O1: SCHOOL SAFETY AND OPERATIONS: SCHOOL SAFETY PLAN AND PROCEDURES</p>	
<p>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.</p>	
<ul style="list-style-type: none"> • During classroom walkthroughs on the day of the oversight visit, classroom emergency supplies were in place including emergency toilet provisions. Classrooms observed also had emergency packets containing current student rosters and emergency procedures. The charter school also provided evidence of having emergency supplies and provisions for prolonged multiday emergency occurrences. • Emergency drills occur on a regular basis. The school engaged in emergency drill on the following dates: August 18, September 15, 2017 (fire); October 19 (EQ); December 13 (fire); January 26, 2018 (fire). 	
<p>O3: STANDARDS–BASED INSTRUCTION</p>	
<p>The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS.</p>	
<ul style="list-style-type: none"> • The scope of classroom observations was based on areas of focus identified in consultation with charter school leadership. The focus areas for classroom observations were: 1) Technology and 2) Use of English Learner Strategies. Classroom observations revealed that students are utilizing technology for research and reinforcement. Programs like Brain Pop and Khan Academy are being utilized in classrooms employing blended learning. • Continued vertical articulation is encouraged to ensure consistency across all grade levels, 6-10. 	
<p>O6: SPECIAL EDUCATION</p>	
<p>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.</p>	
<ul style="list-style-type: none"> • At the time of the visit, review of the 200 IEP report revealed that no IEPs were past due. Charter school leadership reports that their communication and connection with families are strong. • Review of the charter school’s 300G service-tracking report revealed that 95% of services provided are in the Tier 1 and Tier 2 categories. • Students with special needs increased by 5-percentage point on the CASPP (SBAC) in ELA, in the Met or Exceeded categories; while their performance levels in Math show that no students are achieving at the Met or Exceeding categories. 	
<p>O7: SCHOOL CLIMATE AND STUDENT DISCIPLINE</p>	
<p>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>	



- The charter school’s 2016-2017 suspension event rate is 0% equal to the previous year’s suspension rate of 0%. The charter school provides a tiered intervention model that includes schoolwide, grade-level and classroom supports. Alternatives to suspension are also offered as well as positive behavior supports with incentives and appropriate student reflection forms.

Areas Noted for Further Growth and/or Improvement

O1: SCHOOL SAFETY AND OPERATIONS: SCHOOL SAFETY PLAN AND PROCEDURES

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.

- The school is encouraged to come up with a system to ensure that student rosters are updated systematically (include the date it was printed on the roster), given the transiency of the population.

O4: MEETING THE NEEDS OF ALL STUDENTS

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

- School leaders, staff, and home office personnel are working in unison to ensure that students progress. There is much emphasis on individualized instruction with the Learning Center, for all grades, and the 6th grade CADETS Program. The Learning Center focuses on students needing small group support during the school day in the content areas. The CADETS Program is a transitioning program created for students with special needs. The program focuses on character development, academics, and peer relations. Students in this program also receive (SEL) coaching, counseling, and lessons in life skills. The goal is to transition students from the special day class to the general education classroom.
- Additionally, MSA5 provides students needing support, during the school day, with Power Math and Power English courses. The structure of the classes begin with explicit direct instruction, followed by the integration of academic content with a focus on appropriate vocabulary usage, and ending with station activities that are either technology-based, teacher-led, or collaborative.
- Another online support for students is myON which provides a personalized reading list of “just right” books based on each student’s interest. This program allows both teachers and students to track their progress on assignments and monitor their overall reading activity and growth from their own dashboards.

Corrective Action Required

None



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 (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 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
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Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3: 1.2) <input checked="" type="checkbox"/> Evacuation route maps (B3: 1.2) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3: 1.3) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3: 1.4) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3: 1.6) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3: 1.5 and B3A:4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3: 1.7 and B3A:4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2017-2018</i> (“ESSA Grid”) (B3A) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2

<p><i>The school has a system in place to ensure that:</i></p> <ul style="list-style-type: none"> • 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 for student immunization and health screening per applicable law and terms of the charter • school maintains an emergency epinephrine auto-injector (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen 	
Rubric	Sources of Evidence



Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3: 1.1) <input checked="" type="checkbox"/> Evidence that school provides for student immunization and health screening (B3: 2.2) <input checked="" type="checkbox"/> Epi-pen documentation (B3: 2.3) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O3: STANDARDS-BASED INSTRUCTION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #3

<p><i>The school has:</i></p> <ul style="list-style-type: none"> implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), that are applicable to the grade levels served demonstrated evidence of transitioning to implementation of the California Next Generation Science Standards obtained WASC accreditation (high schools only) implemented a system to monitor student progress toward and completion of graduation and A-G requirements (high schools only) received UC/CSU approval of courses (UC Doorways) (high schools only) 	
Rubric	Sources of Evidence



Performance	<input 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 <input checked="" 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 <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 <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	<input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3: 3.1) <input checked="" type="checkbox"/> Evidence of transitioning to CA NGSS (B3:) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3: 3.3) *new schools only <input checked="" type="checkbox"/> WASC documentation (B3: 3.4) <input type="checkbox"/> UC Doorways course approval documentation (B3: 3.5) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3: 3.6) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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"> 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 disaggregates and analyzes data on a regular basis to address individual student needs implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD instruction, progress monitoring, assessment, and reclassification) has appointed a designee to assist and support foster youth 	
Rubric	Sources of Evidence



Performance	<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 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 checked="" 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 (B3: 3.1) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 3.8) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3: 3.8) <input checked="" type="checkbox"/> Evidence of implementation of data analysis system program <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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>		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter <input checked="" 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 (B3: 3.7) <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3: 3.9) <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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3: 3.8) <input checked="" type="checkbox"/> Self-Review Checklist (B3: 4.1) <input type="checkbox"/> Other special education documentation (B3: 4.1) <input 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 <input checked="" type="checkbox"/> Classroom observation (B3: 4.1) <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

	Rubric	Sources of Evidence



Performance	<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) (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3: 4.2) <input checked="" type="checkbox"/> Evidence of data monitoring (B3: 4.2) <input checked="" type="checkbox"/> LAUSD suspension and expulsion data reports <input checked="" type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates
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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p><i>The school:</i></p> <ul style="list-style-type: none"> • 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 • provides faculty and other instructional staff with professional development opportunities to improve instructional practice • provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 	
Rubric	Sources of Evidence



Performance	<input 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 checked="" 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 (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9

<p><i>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</i></p> <ul style="list-style-type: none"> engages in communication that notifies parents 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 (e.g., parents/guardians, students, and teachers) 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 	
Rubric	Sources of Evidence
<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 checked="" type="checkbox"/> Parent-Student Handbook (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3: 4.3) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3: 4.3)



Performance	<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"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3: 4.3) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3: 4.3) <input type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3: 4.3) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3: 4.3) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- complaint procedures**
- Title IX information in accordance with SB1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)**
- Applicable categories described in Charter School Transparency Resolution

**required on website

Rubric	Sources of Evidence
<input 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 checked="" 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 (B3:4.4) for: <ul style="list-style-type: none"> • SB 1375 Information • UCP Procedure and Forms • Complaint Forms • AB2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics



	<ul style="list-style-type: none"> • Student Achievement Information
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O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11

The school has a system in place for the evaluation of school staff designed to ensure that:

- the school’s educational program yields high student achievement
- the school complies with all applicable legal requirements

	Rubric	Sources of Evidence
Performance	<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"/> Evidence of staff evaluation system (B3: 4.5) <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
Performance	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2017-2018</i> form (“ESSA Grid”) (B3A: 1.1) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A: 1.2 – 1.4) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A: 1.5) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A: 2 & 3) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A) <input checked="" type="checkbox"/> Vendor certifications (B3A: 4) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A: 5) <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



8012	2014-15					2015-16					2016-17				
	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
Magnolia Science Academy 5															
Cash and Cash Equivalents		680,853	987,626	925,100	925,625		922,883	879,110	726,788	728,184		529,693	604,517	1,000,807	1,000,807
Current Assets		847,039	1,009,131	1,171,514	1,172,401		1,129,883	1,101,224	1,213,388	1,213,004		1,196,151	1,176,437	1,500,975	1,500,975
Fixed and Other Assets		17,449	17,449	28,207	20,512		11,006	3,311	6,910	6,910		1,709	29,929	22,357	22,357
Total Assets		864,488	1,026,580	1,199,721	1,192,913		1,140,889	1,104,535	1,220,298	1,219,914		1,197,800	1,206,366	1,523,332	1,523,332
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		55,000	213,578	309,090	337,641		109,966	81,672	75,963	142,399		111,280	9,299	142,014	147,775
Long Term Liabilities		0	0	0	0		0	0	0	0		0	5,700	0	0
Total Liabilities		55,000	213,578	309,090	337,641		109,966	81,672	75,963	142,399		111,280	14,999	142,014	147,775
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		809,488	813,002	890,631	855,272		1,030,923	1,022,863	1,144,335	1,077,515		1,086,581	1,191,367	1,381,318	1,375,557
Total Revenues	1,007,552	935,778	1,010,290	1,019,824	1,034,858	1,481,174	1,616,233	1,638,082	1,691,283	1,749,437	1,919,495	2,176,042	2,188,908	2,237,135	2,272,500
Total Expenditures	989,216	1,027,168	1,086,802	1,018,706	1,069,100	1,399,069	1,475,941	1,470,491	1,402,220	1,527,194	1,826,171	2,166,976	2,075,056	1,933,332	1,974,458
Net Income / (Loss)	18,336	(91,390)	(76,512)	1,118	(34,242)	82,105	140,292	167,591	289,063	222,243	93,323	9,066	113,852	303,803	298,042
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
Inc / (Dec) in Net Assets	18,336	(91,390)	(76,512)	1,118	(34,242)	82,105	140,292	167,591	289,063	222,243	93,323	9,066	113,852	303,803	298,042
Net Assets, Beginning	573,358	900,878	900,878	900,877	889,514	813,002	890,631	890,631	890,631	855,272	1,022,863	1,144,335	1,144,335	1,144,335	1,077,515
Adj. for restatement / Prior Yr Adj	0	0	(11,364)	(11,364)	0	0	0	(35,359)	(35,359)	0	0	(66,820)	(66,820)	(66,820)	0
Net Assets, Beginning, Adjusted	573,358	900,878	889,514	889,513	889,514	813,002	890,631	855,272	855,272	855,272	1,022,863	1,077,515	1,077,515	1,077,515	1,077,515
Net Assets, End	591,694	809,488	813,002	890,631	855,272	895,107	1,030,923	1,022,863	1,144,335	1,077,515	1,116,186	1,086,581	1,191,367	1,381,318	1,375,557

8012	Audited Financials					2017-18				
	2013-14	2014-15	2015-16	2016-17	2017-18	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Magnolia Science Academy 5										
Cash and Cash Equivalents	358,831	925,625	728,184	1,000,807	0		1,109,656	0	0	0
Current Assets	940,950	1,172,401	1,213,004	1,500,975	0		1,473,320	0	0	0
Fixed and Other Assets	24,158	20,512	6,910	22,357	0		92,101	0	0	0
Total Assets	965,108	1,192,913	1,219,914	1,523,332	0		1,585,420	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	75,594	337,641	142,399	147,775	0		114,810	0	0	0
Long Term Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	75,594	337,641	142,399	147,775	0		114,810	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Net Assets	889,514	855,272	1,077,515	1,375,557	0		1,450,610	0	0	0
Total Revenues	2,106,705	1,034,858	1,749,437	2,272,500	0	2,379,467	2,527,844	0	0	0
Total Expenditures	1,780,910	1,069,100	1,527,194	1,974,458	0	2,311,381	2,458,552	0	0	0
Net Income / (Loss)	325,795	(34,242)	222,243	298,042	0	68,086	69,292	0	0	0
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
Inc / (Dec) in Net Assets	325,795	(34,242)	222,243	298,042	0	68,086	69,292	0	0	0
Net Assets, Beginning	563,719	889,514	855,272	1,077,515	0	1,191,367	1,381,318	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	563,719	889,514	855,272	1,077,515	0	1,191,367	1,381,318	0	0	0
Net Assets, End	889,514	855,272	1,077,515	1,375,557	0	1,259,452	1,450,610	0	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p>	3
<p>Magnolia Science Academy 5's (MSA 5) fiscal condition is strong and has been upward trending since the 2014-2015 fiscal year. According to the 2016-2017 independent audit report, the school had positive net assets of \$1,375,557 and net income of \$298,042. The 2017-2018 First Interim projects positive net assets of \$1,444,849 and net income of \$69,292.</p> <p>According to the 2016-2017 independent audit report, Magnolia Science Academy 5 is one of 10 schools operated by Magnolia Educational & Research Foundation (MERF). MERF currently has five 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 \$21,478,410 and net income of \$616,950. MERF, without the charter schools, reported negative net assets of (\$766,778) and a net loss of (\$793,576), which was the result of a negative equity transfer of (\$768,450) to MERF and asset write-offs of (\$348,866) absorbed by MERF in light of the closure of MSA Santa Clara (a non-LAUSD authorized MERF school). MERF's 2016-2017 independent audit report (in Note 17), states: "On July 1, 2016, the Board of MERF voted to close MSA Santa Clara, and to transfer the June 30, 2016 operating deficit of (\$731,580) to MERF. MSA Santa Clara also had an additional loss during 2016-2017 in the amount of (\$36,870) for miscellaneous revenues repaid and expenses directly related to final settlement of MSA Santa Clara for a total deficit of (\$768,450)." MERF's 2016-2017 independent audit report also describes the absorption of MSA Santa Clara's remaining assets and liabilities assumed by MERF resulted as an extraordinary item that led to write-offs of accounts receivable and fixed assets in the amount of (\$348,866).</p> <p>According to MERF, in 2016-2017, MSA 5 paid annual management fees of \$90,202 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>	



Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition is strong.

	2013-2014 (Audited Actuals)	2014-2015 (Audited Actuals)	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (First Interim)
Net Assets	\$889,514	\$855,272	\$1,077,515	\$1,375,557	\$1,444,849
Net Income/Loss	\$325,795	(\$34,242)	\$222,243	\$298,042	\$69,292
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0

2. March 2015 Settlement Agreement Status

On or about March 20, 2015, LAUSD and MERF entered into a Settlement Agreement, whereby the parties agreed to resolve a lawsuit filed by MERF when the District rescinded the conditional renewals of Magnolia Science Academy 6, 7, and 8. The terms and conditions set forth in Paragraph 8 of the Settlement Agreement stated: “MERF agrees to be subject to fiscal oversight during fiscal year 2015-16 by the Fiscal Crisis & Management Assistance Team (FCMAT), or a reasonably equivalent fiscal organization, which would oversee MERF’s fiscal operations.” ***Please refer to Item 22 of the Notes section for further details.***

As part of the renewal process for Magnolia Science Academy 4 (MSA 4) and Magnolia Science Academy 5 (MSA 5), in November 2017, MERF provided the final management letter from FCMAT (dated August 25, 2017), and the first two management letters from the School Services of California (SSC) team (dated August 25, 2017, and October 16, 2017, respectively). MSA 4 was approved by the LAUSD Board of Education with fiscal benchmarks, including extended oversight by SSC. Based on the December 4, 2017 amended oversight service agreement between School Services and MERF, SSC’s original scope of work for its oversight review was extended to cover the months of January 2018 through April 2018, with field work and management letters addressing SSC’s review for these four months slated for completion by June 30, 2018. Based on the January 9, 2018 email confirmation between SSC and the Charter Schools Division (CSD), it was agreed that SSC’s extended four-month review would cover a sample of financial transactions for MSA 4, 6, 7 and 8 (the current LAUSD-authorized MERF charter schools, with the exception of MSA 5). MSA 5’s charter



renewal was denied by the LAUSD Board of Education on November 7, 2017 (based on the school’s academic performance), but was subsequently approved by the Los Angeles County Office of Education (LACOE).

Based on the CSD’s 2017-2018 oversight visit and review of a sample of check disbursements and credit card transactions, the CSD noted that MERF had made significant improvements in its accounting and fiscal practices (based on FCMAT’s and SSC’s recommendations), including its implementation of an enhanced, customized software system (i.e., COOLSIS). Benefits of MERF’s improved system include: 1) MERF’s Board-approved budgets are uploaded to the purchasing software and are now part of the purchasing and payment approval process; 2) Purchase requisitions, purchase orders, and purchase approvals are now managed within the COOLSIS system; and, 3) Vendor information and resource codes are now system-required before MERF sends any request for approval. Although the CSD did note discrepancies through its review of a sample of check disbursements and credit card transactions, these discrepancies occurred prior to MERF’s implementation of its enhanced COOLSIS system (which commenced in approximately October 2017). The discrepancies in question are detailed in the “**Areas Noted for Further Growth and/or Improvement**” section below.

In summary, the CSD recognizes the progress made by MERF towards fulfilling the fiscal oversight requirements set forth in Paragraph 8 of the March 2015 Settlement Agreement (i.e., since the 2016-2017 oversight visit). The CSD will continue to monitor SSC’s findings and recommendations for the prescribed four-month period spanning from January 2018 through April 2018. Furthermore, the CSD will continue to monitor MERF’s compliance with fiscal oversight by SSC and MERF’s progress in remedying the findings from SSC through oversight.

Areas Noted for Further Growth and/or Improvement:

Through conducting fiscal oversight and analyzing the data below, the Charter Schools Division requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the five MERF charter schools that are currently authorized by LAUSD. The Charter Schools Division reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with MERF’s Magnolia Public Schools Financial Policies and Procedures Manual (P’s & P’s). 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 in each charter school’s Annual Performance-Based Oversight Visit Report, with the exception of the fiscal condition and/or the segregation of duties reviews, which are school-specific and reviewed separately for each MERF charter school.

1. Bank Reconciliation Reports

Page 1 of the CSH107 Bank Account Reconciliations provides guidance concerning bank account reconciliations.

The policy reads: “**Responsibilities:** Chief Financial Officer [CFO] or designee is responsible for review and approval of all reconciliations.” “**Bank Statement Preparation:** After receipt of the monthly bank statement and/or online printing of the monthly bank statement, Back-office accountant should prepare the monthly bank reconciliation by the 20th of the following month.”



Based on the CSD’s review of the bank statements and bank reconciliation reports for the months of July 2017 through December 2017, it was noted that the bank reconciliation reports showed no evidence of reviews or approvals by MERF’s CFO or designee. Further, the preparation and review/approval dates of the bank reconciliation reports were also omitted, hence, the CSD’s assessment regarding the school’s timely preparation/review of the reports could not be determined. In addition, the CSD noted that FCMAT, per its August 25, 2017 management letter, made a recommendation related to “Bank Statements and Reconciliations,” which states: “Include the signatures of the individual who prepared the bank statement reconciliation and the individual who reviewed/approved it, and the respective dates of same, on the reconciliation documents.”

As a result of the above observation, MERF’s CFO advised the CSD that MERF’s Senior Financial Analyst reviews the monthly bank reconciliation reports via email. Further, effective immediately and moving forward, MERF declared that it would implement a means of documenting the signatures of the bank reconciliation report reviewers and the report review dates.

2. Credit Cards

Page 2 of the CSH111 CREDIT CARDS AND DEBIT CARDS section states: “It is the policy of the Organization to provide credit cards to authorized members of the Organization staff in the performance of their duties and responsibilities.”

Based on the CSD’s review of a sample credit card statements and supporting documentation, the CSD noted that the credit card accounts for three of the five LAUSD-authorized Magnolia charter schools (i.e., MSA 4, 7 and 8), were all assigned to the former MERF CFO (who left the organization in November 2016). However, these accounts remained active until February 5, 2018. The CSD also noted that some of the aforementioned former MERF CFO’s credit card accounts continued to incur charges and/or delinquent fees. In addition, the former MERF CFO’s credit card account with MSA 8 incurred fraudulent charges in August 2017. MERF confirmed that refunds of all fraudulent charges had been received by MERF as of the date of this report, and, as of February 5, 2018, all credit card accounts under the former CFO’s name had officially been closed.

The CSD recommends that the school and MERF ensure that all credit card transactions are monitored and reviewed timely. Further, in the event that the credit card holder is no longer working for the organization, the CSD recommends that MERF ensure that any automatic payments are stopped, all credit card balances are paid in full, and all credit card accounts associated with former members of the organization are closed immediately, to prevent potential fraudulent transactions, late fees, and/or finance charges to these credit cards.

The CSD will continue to monitor these issues through oversight.

3. Automated Clearing House (ACH)/Recurring Automatic Payments

Based on the CSD’s review of a sample bank statements and supporting documentation, it was noted that two ACH transactions for Ready Refresh, listed below, included late fees in the amount of \$10, pertaining to invoices for the months of February 2017 and March 2017 for MSA 4 and MSA 6. The table below also illustrates the ACH transactions by MERF for recurring automatic



payments. However, MERF’s Magnolia Public Schools Financial Policies and Procedures Manual makes no reference to ACH and recurring automatic payment processes.

The CSD recommends that MERF update its P’s & P’s to provide guidance in this area, including clarification regarding permissible recurring payments, and delineate the approval and review processes pertaining to ACH transactions and recurring automatic payments.

Date	Vendor	Check Number	Description	Check Amount	School
4/3/2017	Ready Refresh	DB040317-1	DB040317-1; Ready Refresh	\$ 1,023.23	MSA 4
4/5/2017	Ready Refresh	DB040517	DB040517; Ready Refresh	\$ 439.69	MSA 6
9/25/2017	Arc Inc.	82720	ASES Grant October 2017	\$ 30,000.00	MSA 8

Other Observations:

1. During the 2017-2018 fiscal oversight process, the CSD noted instances whereby MERF did not respond or provide documentation/information pertaining to the CSD’s requests within the CSD’s stated deadlines. Education Code section 47604.3 requires that charters “promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding financial records, from its chartering authority.” Failure to timely respond to the CSD’s requests or inquiries constitutes a violation of the terms of the charter with LAUSD, as well as applicable state law and, in this instance, may impact the school’s 2018-2019 fiscal rating.

The CSD communicated with MERF’s CFO (initially via telephone, and again, via email, on 3/14/2018), regarding MERF’s need to improve the timeliness of its responses to the CSD. MERF’s CFO indicated that she and the MERF team would work on meeting the CSD’s deadlines so that timeliness would not continue to be an issue. The CSD will continue to monitor this issue through oversight.

Date	Email or Phone Correspondence (sent by the CSD staff)	Email Recipients	Email Copied to	Comments
02/16/18	CSD – sent an email requesting written responses from the CFO, due COB 02/23/18.	CFO	Senior Financial Analysts, FOA	



02/27/18	CSD - sent follow-up email with a new deadline of 03/01/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	The CSD sent a reminder for documentation not provided, that was originally due on 02/23/18.
03/01/18	CSD – sent email requesting a copy of MERF’s 2016-2017 Audited Financial Report, due COB 03/02/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	
03/05/18	CSD - sent email requesting a phone call with the CFO.	CFO, Senior Financial Analyst	Senior Financial Analysts, FOA	The CSD communicated the need for a phone call to clarify additional questions.
03/06/18	CSD – sent email, once again requesting a conference call with the CFO, and reminding MERF of previous request with a due date of COB 03/02/18.	Senior Financial Analyst	CFO, Senior Financial Analyst; EdTec	The CSD communicated a new timeline of 03-07-18 by 12:00 noon.
03/09/18	CSD – sent a follow-up email communicating the need to connect with the CFO to finalize oversight report.	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	On 03/09/18, the CSD received a voice message from the CFO following up on the prior request due on 03-07-18.

2. Based on the CSD’s review of a sample check disbursements, the CSD noted the instances listed in the table below, whereby the documentation provided did not contain itemized receipts for the related purchases, even though the reimbursements were supported by other documentation. The CSD recommends that, consistent with recommended industry practices (as referenced in the 2017 California Charter School Accounting and Best Practices Manual published by FCMAT), MERF update its fiscal policies and procedures to require original, detailed receipts for all purchases made via check disbursements or credit cards. In addition, the CSD noted that, per FCMAT’s August 25, 2017 management letter, FCMAT made the following recommendations related to “Accounts Payable,” which states: “1) Pay invoices timely and 2) Require itemized receipts for transactions.”

Date	Vendor	Check Number	Description	Check Amount	School
11/21/2016	Brad M.	52267	Reimb: El Pollo Loco Lunch for Staff	\$ 324.16	MSA 5
5/19/2017	Frances T. Cameron	82630	Reimb: Mileage & Dinner	\$ 172.41	MSA 8



3. Based on the CSD’s review of the MERF Board meeting minutes, and per confirmation received from the Sr. Financial Analyst of MERF, the CSD noted that the governing board meeting minutes provided by MERF did not evidence its receipt, review, and discussion of the CSD’s 2016-2017 Annual Performance-Based Oversight Visit reports (please refer to Item 14 in the Notes section below). The CSD recommends that, beginning in 2017-2018, MERF present and discuss the CSD’s Annual Performance-Based Oversight Reports with its governing board, and document said discussion regarding same. This is one of the required fiscal items in the CSD’s Annual Performance-Based Oversight Visit Preparation Guide, beginning in 2017-2018.

The recommended actions and/or the specific fiscal policies and procedures referenced in the “Other Observations” section of this report will be reviewed by the Charter Schools Division as part of the next oversight visit. The observed results may be factored into the school’s rating for next year.

Corrective Action Required:

The governing board and leadership team of the charter school are responsible for managing the day-to-day operations of the school. Thus, the CSD’s recommendations concerning the above-noted findings and observations should be discussed at MERF’s next board meeting, but, in any event, no later than 60 days following the school’s receipt of this report. After the schools’ 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 staff will continue to monitor these issues through oversight.

**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2017 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 July 2017 through December 2017. Selected the months of July 2017 through December 2017 for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. Citi Bank – 5041 MSA Bell (Checking)
 - b. Citi Bank – 6769 MSA 4 (Checking)
 - c. Citi Bank – 6694 MSA 5 (Checking)
 - d. Citi Bank – 6121 MSA 6 (Checking)
 - e. Citi Bank – 2703 MSA 7 (Checking)
3. Reviewed credit card statements from May 2017 through October 2017 for all the credit card accounts below (except for the statements related to the accounts in the name of the former CFO as specified below). Selected the months of January 2017 through October 2017, where applicable, for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. American Express, credit card ending in 1003 (Former CFO – MSA 4) - January 2017 through July 2017
 - b. American Express, credit card ending in 1004 (CFO – MSA 4)
 - c. American Express, credit card ending in 1002 (CFO – MSA 5)
 - d. American Express, credit card ending in 1000 (CFO – MSA 6)
 - e. American Express, credit card ending in 1005 (Former CFO – MSA 7) - January 2017 through October 2017
 - f. American Express, credit card ending in 1007 (CFO – MSA 7)
 - g. American Express, credit card ending in 1000 (Former CFO – MSA 8) - January 2017 through May 2017, and August 2017 through October 2017
 - h. American Express, credit card ending in 1006 (CFO – MSA 8)
4. Reviewed the following 39 checks/debit transactions. Discrepancies were noted for further growth and/or improvement above.
 - a. Check numbers: 42338, 62329, 52267, 52273, DB120916, 42357, 82525, 52290, 72610, 82535, 42385, 82554, 82571, 62400, 82585, 52328, DB040317-1, 72722, 52346, 72741, 82630, 42454, 62472, 42467, 72780, 62471, 82663, 72801, 72803, 62496, DB062817, 42499, 52421, 82720, 52445, 42548, 82752, DB111417 and 82755.
5. Per the 2016-2017 audit report, the school's cash and cash equivalents is \$1,000,807, and total expenditures equal \$1,974,458. Therefore, the school's cash reserve level is 50.6%, 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 Bell and MSA 6. No discrepancies were noted.
8. MSA 5 did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
9. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
10. Governing board meeting minutes reflecting the adoption of the 2017-2018 budget were provided.



11. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
12. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
13. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
14. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were *not* provided. See the CSD's recommendation in the "Other Observations" section above.
15. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
16. Governing board meeting minutes reflecting the discussion of the most current independent audit report and resolution of any audit findings, including material weaknesses, or deficiencies were provided.
17. Evidence of MSA 5 offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
18. Equipment inventory was provided.
19. The 2017-2018 LCAP was submitted to LAUSD.
20. The EPA allocation and expenditures are posted on the charter school's website.
21. The 2016-2017 audited and unaudited actuals nearly mirror each other.
22. March 2015 Settlement Agreement (further details related to Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above):

Pursuant to the March 2015 Settlement Agreement, MERF entered a study agreement with FCMAT to review a sample of financial transactions for all eight Magnolia schools then-authorized by LAUSD, for the 12-month period spanning from July 2015 through June 2016. Given the significant delays by MERF, FCMAT was unable to perform its obligations, and documented such to MERF and LAUSD in its management letters issued during 2015-2016. On August 3, 2016, FCMAT entered into an Amended Study Agreement with MERF (at MERF's request). The Amended Study Agreement's scope of work was truncated to include a review of July 2015 (for all eight Magnolia schools then-authorized by LAUSD), followed by reviews consisting of a sampling of financial transactions and reports for August 2015, May 2016 and June 2016 (for MSA 6, MSA 7, and MSA 8 only).

Due to MERF's failure to timely respond to FCMAT's document requests and other significant reasons stated in the findings of fact in support of denial of the renewal charter petition, the LAUSD Board of Education approved the CSD's denial recommendations for MSA 1, MSA 2, and MSA 3 on October 18, 2016. MSA 1, 2 and 3 were subsequently approved by LACOE.

In response to the CSD's request pertaining to MERF in March 2017, FCMAT indicated that it was unable to move forward with a study agreement for the review and testing of MERF schools' 2016-2017 financial transactions. As such, the CSD subsequently concurred (on May 15, 2017) with the proposal that School Services of California be contracted by MERF to continue the fiscal oversight started by FCMAT.

See the current status on MERF's compliance with the March 2015 Settlement Agreement under Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 5

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/21/2018

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

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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><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The two most current audits show no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other. 	<p><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The most current audit shows no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school generally adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other.



<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>15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement</p> <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salary schedules/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <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> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salaries schedule/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Existing Schools (based on the most current audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 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); 2. All vendors and staff are paid in a timely manner; 3. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 4. Governing board adopts the annual budget; 5. The EPA allocation and expenditures are posted on the charter school’s website; 6. The LCAP is submitted to the appropriate agencies; 7. Have an audit conducted annually by an independent auditing firm; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; and 9. There is no apparent conflict of interest. <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The cash balance at the beginning of the school year is positive; 2. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 3. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 	<p><u>Existing Schools (based on the most current audit):</u> 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>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<ol style="list-style-type: none"> 4. 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; 5. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 6. Current audit shows no material weaknesses, deficiencies and/or findings; 7. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 8. Governing board approves any amendment(s) to the charter school’s budget; and 9. Governing board approved LCAP is posted on the charter school’s website. <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>



<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>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division. 2. 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. 3. 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. 4. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues c. Projected expenses and revenues have no significant variance from budget 5. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes. 6. The LCAP is submitted to the appropriate agencies. 7. The EPA allocation and expenditures are posted on the charter school’s website, if applicable. <p><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>New Schools:</u></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><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



LOS ANGELES UNIFIED SCHOOL DISTRICT **CHARTER SCHOOLS DIVISION**

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT **2017-2018 SCHOOL YEAR**

MAGANOLIA SCIENCE ACADEMY 6

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 Name:		Magnolia Science Academy 6			Location Code:	8013
Current Address:		City:	ZIP Code:	Phone:	Fax:	
3754 Dunn Drive		Los Angeles	90034	310-842-8555	310-842-8558	
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2014 to June 30, 2019			1	West		
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:	
156		300	6 th – 8 th		6 th – 8 th	
Total Number of Staff Members:	14	Certificated:	8	Classified:	6	
Charter School's Leadership Team Members:		John Terzi, Principal; James Choe, Assistant Principal				
Charter School's Contact for Special Education:		Ms. Terry Bourdages				
CSD Assigned Administrator:	Yolanda Jordan		CSD Fiscal Services Manager:	Lourdes Echavarria		
Other School/CSD Team Members:		Helena Yoon-Fontamillas				
Oversight Visit Date:		February 14, 2018		Fiscal Review Date (if different):	February 1, 2018	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):		No		LAUSD Co-Location Campus (if applicable):		
				DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:		

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
3	3	3	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. 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 2017-2018*. 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	3

Areas of Demonstrated Strength and/or Progress

G1: 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)

- As evidenced in Binder #1, there is evaluation protocol that details how and when school leaders are evaluated. Additionally, it measures school leaders using the California Professional Standards for Education Leaders (CPSELs)
- While there is evidence of a Superintendent Performance Evaluation Form, it recommended that the Magnolia Public School (MPS) Board create an evaluation protocol for the CEO/Superintendent of MPS.

G4: 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 as evidenced by reviewing MPS board meeting minutes and agendas, as well as the ESSA Grids at school sites.

G5: The Governing Board monitors school performance and other internal data to inform decision-making

- As evidenced in Board meeting agendas, minutes, and Academic Committee meeting minutes, academic “Glows, Grows and Next Steps” are discussed to inform decisions regarding each MPS school’s academic trajectory

Areas Noted for Further Growth and/or Improvement

Corrective Action Required

None

Notes:

Other: The Magnolia Public Schools governing board is encouraged to continue discussions and supports at the school site level in the incorporation of STEM, STEAM, or STREAM within different content areas and classrooms.

UPDATE regarding the Settlement Agreement with LAUSD: Magnolia Education and Research Foundation (MERF) and School Services California executed an amendment to the original contract on 12/12/17 to extend the oversight services through July 31, 2018. This amendment extended the scope of work to cover the months of January through April 2018, with field work and management letters addressing these four months by June 30, 2018.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 6

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/14/2018

The Charter School Division will continue to monitor MERF's compliance of the fiscal oversight provision required in the March 2015 Settlement Agreement between LAUSD and MERF through the end of MSA 6's current charter term.

On 11/7/17 the LAUSD BOE voted on non-renewal for MSA 5.
All details are delineated in the Findings of Fact BOE Report #179-17/18.

****NOTE: 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.***



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"> Governing Board (composition, structure, roles and responsibilities) committees/councils, including but not limited to those mandated by laws or regulations evaluation of school's executive level leadership 		
Performance	Rubric	Sources of Evidence
	<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 (B1: 1) <input checked="" type="checkbox"/> Bylaws (B1: 2) <input checked="" type="checkbox"/> Board member roster (B1: 3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars and agendas <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1: 7) <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"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act 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 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 		
Performance	Rubric	Sources of Evidence



Performance	<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 and minutes (B1: 4) <input checked="" type="checkbox"/> Board meeting calendar (B1: 5) <input checked="" type="checkbox"/> Brown Act training documentation (B1: 8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1: 9) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
Performance	<input 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 checked="" 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 (B1: 4) <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1: 10) <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation (B1: 11) <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) (B1: 12) <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process (B1: 13.1) <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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements (B1: 13.2) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <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:</i>		
<ul style="list-style-type: none"> 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 ongoing monitoring of the school’s implementation of its LCAP action plans and progress toward LCAP goals 		
Rubric		Sources of Evidence
Performance	<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 (B1: 4) <input checked="" type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making (B1: 14) <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"> The school is fiscally strong and net assets are positive in the prior two independent audit reports. 		
Rubric		Sources of Evidence
Performance	<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 and net assets are negative in the most current independent audit report, or 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 and net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division	<input type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input 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.

	Rubric	Sources of Evidence
Performance	<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, or 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, or 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 (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p>A1: The majority of numerically significant subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17</p>	
<ul style="list-style-type: none"> • Per CDE, MSA 6 has 5 subgroups (African-American, English Learners, Latino, Socioeconomically Disadvantaged, and Students with Disabilities). However, there are only 2 numerically significant subgroups (Latino and Socioeconomically Disadvantaged or SED). Latino students grew by 1.06 percentage points and SED students decreased by 0.82 percentage points in ELA. 	
<p>A2: The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17</p>	
<ul style="list-style-type: none"> • Per CDE, MSA 6 has 5 subgroups (African-American, English Learners, Latino, Socioeconomically Disadvantaged, and Students with Disabilities). However, there are only 2 numerically significant subgroups (Latino and Socioeconomically Disadvantaged or SED). Latino students grew by 1 percentage point and SED students decreased by 0.18 percentage points in Math. 	
<p>A3: The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median</p>	
<ul style="list-style-type: none"> • Per CDE and a data set provided by LAUSD Data and Accountability, 42.77% of MSA 6’s students Met and Exceeded Standards on the SBAC in ELA, compared to the Resident Schools Median of 28.21%. 	
<p>A4: The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate higher than the Resident Schools Median</p>	
<ul style="list-style-type: none"> • Per CDE and a data set provided by LAUSD Data and Accountability, 25.29% of MSA 6’s students Met and Exceeded Standards on the SBAC in Math, compared to the Resident Schools Median of 15.09%. 	
<p>A5: The school reclassifies English Learners at a rate higher than the District average</p>	
<ul style="list-style-type: none"> • Per the CDE Reclassification Report, 64% of MSA 6’s English Learners reclassified, compared to the District average at 16.8% 	
<p>A6: The school’s percentage of “At Risk” English Learners is at rate lower than the District average</p>	
<ul style="list-style-type: none"> • Per the CDE’s “At-Risk” by Grade report, MSA 6 is at 0%, compared to the District average at 5.9%. 	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p>	
<p>A7: The school’s percentage of LTELs is at a rate higher than the District average</p>	
<ul style="list-style-type: none"> • Per the CDE’s Long-Term English Learners (LTEL) by Grade report, MSA 6 is at 11.5%, compared to the District average at 8.3% 	
<p><u>Corrective Action Required</u></p>	
<p>None</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 6

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/14/2018

Notes:

****NOTE: Upon the State Board of Education's finalization of California's School Dashboard, CSD will determine implications for the oversight report.***



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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.1) <input type="checkbox"/> Other: (Specify)

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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.2) <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"> Schoolwide ELA data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th 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) (B2: 1.3) <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"> Schoolwide Math data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in Math is significantly lower than the Resident Schools Median. <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.4) <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability <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 2016-2017 (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the District average <input type="checkbox"/> The school reclassifies English Learners at a rate equal to the District average <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the District average <input type="checkbox"/> The school does not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) (B2: 1.5) <input type="checkbox"/> CELDT Criterion reports (CDE) (B2: 1.5.1) <input type="checkbox"/> School internal reclassification data <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 2016-2017 (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate equal to the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> “At-Risk” by Grade report (CDE): 2016-2017 (B2: 1.6)



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"> Providing supports for Long Term English Learners 2016-2017 (CDE) 	
Performance	Sources of Evidence
<p>Rubric</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school's percentage of LTELs is at rate lower than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate equal to the District average <input checked="" type="checkbox"/> The school's percentage of LTELs is at a rate higher than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator 	<p>Sources of Evidence</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2016-2017) (B2: 1.6)

A8: FOUR-YEAR 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"> Four-Year Cohort Graduation Rate (CDE) (high schools only) 	
Performance	Sources of Evidence
<p>Rubric</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate higher than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate equal to the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate lower than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate substantially lower than the District average <input checked="" type="checkbox"/> No assessment of performance for this indicator 	<p>Sources of Evidence</p> <ul style="list-style-type: none"> <input type="checkbox"/> Four-Year Cohort Graduation Rate (CDE) (B2: 3.1) <input type="checkbox"/> Other: (Specify) <hr/> <p>List of the school's A-G requirements (CSD internal use only)</p>



***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 data as measured by:

- The school's internal assessments (with analysis of results) by subgroups and grade-levels
- 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
- Results of internal assessments show growth in student achievement in ELA and Math

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. NWEA, DIBELS, or Stanford 10) and/or other assessment instruments for which the school can demonstrate validity/reliability.

Rubric		Sources of Evidence
Performance	<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. <input type="checkbox"/> The school has not collected and/or analyzed and monitored internal assessment or other academic achievement data	<input type="checkbox"/> Internal academic performance and progress data and information (B2: 2.1 – 2.6) <input type="checkbox"/> School Internal Assessment Data Report or equivalent <input type="checkbox"/> Other: (Specify) N/A



CALIFORNIA SCHOOL DASHBOARD STATE PRIORITIES

Summary of School Performance

*Indicators A10-A19 reflect the school’s ratings on the Dashboard. For Indicators A10 –A19 the school’s ratings on the California School Dashboard will not impact the overall Student Achievement and Educational Performance Rating for 2017-2018 oversight but will provide informational areas of focus. California School Dashboard Indicators will figure into 2018-2019 oversight ratings.

Blue Green Yellow Orange Red

A10: Priority 4-3.1 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 English Language Arts

The school has achieved the performance level of Orange

A11: Priority 4-3.2 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 Mathematics

The school has achieved the performance level of Orange

A12: Priority 4-3.5 Student Achievement English Learner Progress Indicator

The school has achieved the performance level of N/A

A13: Priority 5-3.7 Student Engagement- Chronic Absenteeism Indicator

The school has achieved the performance level of N/A

**this indicator will be available Fall 2018*

A14: Priority 6-3.8 School Climate- Suspension Rate Indicator

The school has achieved the performance level of Blue

A15: 2.5 Suspension and Expulsion Rates

The school has achieved the performance level of N/A



HIGH SCHOOLS ONLY:

A16: Priority 4-3.3 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 English Language Arts

The school has achieved the following status _____ and change _____ N/A

A17: Priority 4-3.4 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 Mathematics

The school has achieved the following status _____ and change _____ N/A

A18: Priority 5-3.6 Student Engagement-Graduation Rate Indicator

The school has achieved the performance level of _____ N/A

A19: Priority 7 & 8-3.9 Access to and Outcomes in a Broad Course of Study-College/Career Indicator

The school has achieved the following status _____ N/A

**this indicator will be available Fall 2017*

NOTES:

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



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O3: The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS</p> <ul style="list-style-type: none"> • Per discussion with leadership, MSA 6 continues to implement standards-based instruction with Common Core aligned instructional materials • MSA 6 received WASC Accreditation through 6/30/22 <p>O4: 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"> • Per discussion with leadership and responses to guided questions, MSA 6 continues to provide intervention for students during the school day, as well as after school and on Saturdays. • New this year: a math coach comes to the site 3 days a week to support teachers as well as work with small groups of students. Additionally, there is a school-site mentor available to support all new teachers. • English Learners received 40 minutes per day of ELD instruction • School leadership shared their Interim Comprehensive Assessment (ICA) results in Math, as of February 12, 2018 and it shows increases from the end of year, 2016-2017 ICA results. 6th grade increased from 8% to 13%; 7th grade increased from 17% to 25%; and 8th grade from 14% to 23%. <p>O6: 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</p> <ul style="list-style-type: none"> • Per Welligent reports, MSA 6 is compliant as it relates to timely completion of IEPs and service tracking. As of the day of the visit, all students receiving services were in Tier 1. <p>O8: 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</p> <ul style="list-style-type: none"> • As evidenced in Binder #3, emails from the Magnolia Public Schools (MPS) office, and discussion with school leadership, MSA 6 has ongoing professional development for staff, on campus and MSP-wide. • Per leadership, a math teacher left midyear last school year which may account for the slight drop in the Math SBAC scores. In an effort to support all students in the area of math, MSA 6 hired two math teachers and provided those teachers with professional development to learn new strategies to implement common core. 	



Areas Noted for Further Growth and/or Improvement

Corrective Action Required

None

Notes:

****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 (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 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
Performance	<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) (B1: 10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3: 1.2) <input checked="" type="checkbox"/> Evacuation route maps (B3: 1.2) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3: 1.3) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3: 1.4) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3: 1.6) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3: 1.5 and B3A:4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3: 1.7 and B3A:4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2017-2018</i> (“ESSA Grid”) (B3A) <input checked="" type="checkbox"/> Site/classroom observation <input type="checkbox"/> Discussion with school leadership <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 for student immunization and health screening per applicable law and terms of the charter
- school maintains an emergency epinephrine auto-injector (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen

Rubric		Sources of Evidence
Performance	<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) (B1: 10) <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3: 1.1) <input checked="" type="checkbox"/> Evidence that school provides for student immunization and health screening (B3: 2.2) <input checked="" type="checkbox"/> Epi-pen documentation (B3: 2.3) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

The school has:

- implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), that are applicable to the grade levels served
- demonstrated evidence of transitioning to implementation of the California Next Generation Science Standards
- obtained WASC accreditation **(high schools only)**
- implemented a system to monitor student progress toward and completion of graduation and A-G requirements **(high schools only)**
- received UC/CSU approval of courses (UC Doorways) **(high schools only)**



	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input 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 <input checked="" 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 <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 <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3: 3.1) <input checked="" type="checkbox"/> Evidence of transitioning to CA NGSS (B3:) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3: 3.3) *new schools only <input checked="" type="checkbox"/> WASC documentation (B3: 3.4) <input type="checkbox"/> UC Doorways course approval documentation (B3: 3.5) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3: 3.6) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Classroom observation <input 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>The school:</p> <ul style="list-style-type: none"> • 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 • disaggregates and analyzes data on a regular basis to address individual student needs • implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD instruction, progress monitoring, assessment, and reclassification) • has appointed a designee to assist and support foster youth 	
Rubric	Sources of Evidence



Performance	<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"/> Evidence of standards-based instructional program (B3: 3.1)
	<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 checked="" type="checkbox"/> LCAP (B3: 3.2)
	<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"/> Professional development documentation (B3: 3.7)
	<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 intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students (B3: 3.8)
		<input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3: 3.8)
		<input checked="" type="checkbox"/> Evidence of implementation of data analysis system program
		<input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent
		<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>		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter	<input checked="" type="checkbox"/> Professional development documentation (B3: 3.7)
	<input checked="" type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter	<input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3: 3.9)
	<input type="checkbox"/> The school has partially implemented the key features of the educational program described in the charter	<input checked="" type="checkbox"/> Classroom observation
	<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"/> 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
Performance	<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) (B1: 10) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3: 3.8) <input checked="" type="checkbox"/> Self-Review Checklist (B3: 4.1) <input checked="" type="checkbox"/> Other special education documentation (B3: 4.1) <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 <input type="checkbox"/> Classroom observation (B3: 4.1) <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

	Rubric	Sources of Evidence



Performance	<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) (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3: 4.2) <input checked="" type="checkbox"/> Evidence of data monitoring (B3: 4.2) <input checked="" type="checkbox"/> LAUSD suspension and expulsion data reports <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates
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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p><i>The school:</i></p> <ul style="list-style-type: none"> • 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 • provides faculty and other instructional staff with professional development opportunities to improve instructional practice • provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 	
Rubric	Sources of Evidence



Performance	<input 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 checked="" 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 (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9

<p><i>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</i></p> <ul style="list-style-type: none"> engages in communication that notifies parents 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 (e.g., parents/guardians, students, and teachers) 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 	
Rubric	Sources of Evidence
<input type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3: 4.3) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3: 4.3)



Performance	<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"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3: 4.3) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3: 4.3) <input type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3: 4.3) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3: 4.3) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- complaint procedures**
- Title IX information in accordance with SB1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)**
- Applicable categories described in Charter School Transparency Resolution

**required on website

Rubric	Sources of Evidence
<input 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 checked="" 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 (B3:4.4) for: <ul style="list-style-type: none"> • SB 1375 Information • UCP Procedure and Forms • Complaint Forms • AB2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics



	<ul style="list-style-type: none"> • Student Achievement Information
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O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11

The school has a system in place for the evaluation of school staff designed to ensure that:

- the school’s educational program yields high student achievement
- the school complies with all applicable legal requirements

	Rubric	Sources of Evidence
Performance	<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"/> Evidence of staff evaluation system (B3: 4.5) <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
Performance	<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 2017-2018</i> form (“ESSA Grid”) (B3A: 1.1) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A: 1.2 – 1.4) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A: 1.5) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A: 2 & 3) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A) <input checked="" type="checkbox"/> Vendor certifications (B3A: 4) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A: 5) <input 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):



8013 Magnolia Science Academy 6	2014-15					2015-16					2016-17				
	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		154,658	287,976	806,785	806,785		1,140,596	745,313	535,799	535,854		309,957	425,269	754,059	754,059
Current Assets		475,835	443,930	1,044,455	1,044,455		1,323,596	945,537	1,129,326	1,137,099		1,111,811	1,099,539	1,377,897	1,389,727
Fixed and Other Assets		0	0	0	0		5,837	79,810	66,400	66,400		37,674	37,674	51,733	51,733
Total Assets		475,835	443,930	1,044,455	1,044,455		1,329,233	1,025,347	1,195,726	1,203,499		1,149,285	1,137,213	1,429,630	1,441,460
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		300,000	155,150	559,018	569,898		293,042	122,405	182,262	246,234		108,457	12,812	176,677	182,539
Long Term Liabilities		0	0	0	0		181,177	0	6,888	0		0	6,500	0	0
Total Liabilities		300,000	155,150	559,018	569,898		474,219	122,405	188,950	246,234		108,457	19,312	176,677	182,539
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		175,835	288,780	485,437	474,557		855,014	902,942	1,006,776	957,265		1,040,828	1,117,902	1,252,953	1,258,921
Total Revenues	1,194,881	1,321,864	1,466,358	1,493,504	1,511,887	1,472,371	1,811,043	1,805,855	1,949,276	1,978,995	1,952,604	1,962,456	1,994,599	1,990,263	2,032,981
Total Expenditures	1,100,880	1,210,491	1,242,040	1,072,529	1,101,792	1,292,304	1,441,465	1,377,470	1,417,057	1,496,287	1,622,710	1,878,893	1,822,134	1,882,747	1,731,322
Net Income / (Loss)	94,001	111,373	224,318	420,975	410,095	180,067	369,578	428,385	532,219	482,708	329,894	83,563	172,465	307,516	301,659
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
Inc / (Dec) in Net Assets	94,001	111,373	224,318	420,975	410,095	180,067	369,578	428,385	532,219	482,708	329,894	83,563	172,465	307,516	301,659
Net Assets, Beginning	(238,029)	70,336	70,336	70,336	64,462	288,780	485,436	485,436	485,437	474,557	902,942	1,006,776	1,006,776	1,006,776	957,265
Adj. for restatement / Prior Yr Adj	0	(5,874)	(5,874)	(5,874)	0	0	0	(10,879)	(10,880)	0	0	(49,511)	(61,339)	(61,339)	0
Net Assets, Beginning, Adjusted	(238,029)	64,462	64,462	64,462	64,462	288,780	485,436	474,557	474,557	474,557	902,942	957,265	945,437	945,437	957,265
Net Assets, End	(144,028)	175,835	288,780	485,437	474,557	468,847	855,014	902,942	1,006,776	957,265	1,232,836	1,040,828	1,117,902	1,252,953	1,258,921

8013 Magnolia Science Academy 6	Audited Financials					2017-18				
	2013-14	2014-15	2015-16	2016-17	2017-18	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	157,957	806,785	535,854	754,059	0		811,084	0	0	0
Current Assets	481,282	1,044,455	1,137,099	1,389,727	0		1,365,004	0	0	0
Fixed and Other Assets	8,461	0	66,400	51,733	0		102,842	0	0	0
Total Assets	489,743	1,044,455	1,203,499	1,441,460	0		1,467,846	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	425,281	569,898	246,234	182,539	0		180,209	0	0	0
Long Term Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	425,281	569,898	246,234	182,539	0		180,209	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Net Assets	64,462	474,557	957,265	1,258,921	0		1,287,637	0	0	0
Total Revenues	1,452,643	1,511,887	1,978,995	2,032,981	0	1,966,979	1,890,155	0	0	0
Total Expenditures	1,036,720	1,101,792	1,496,287	1,731,325	0	1,789,080	1,855,471	0	0	0
Net Income / (Loss)	415,923	410,095	482,708	301,656	0	177,899	34,684	0	0	0
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
Inc / (Dec) in Net Assets	415,923	410,095	482,708	301,656	0	177,899	34,684	0	0	0
Net Assets, Beginning	(351,461)	64,462	474,557	957,265	0	1,117,901	1,252,953	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	(351,461)	64,462	474,557	957,265	0	1,117,901	1,252,953	0	0	0
Net Assets, End	64,462	474,557	957,265	1,258,921	0	1,295,801	1,287,637	0	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p>	3
<p>Magnolia Science Academy 6’s (MSA 6) fiscal condition is strong and has been upward trending since the 2013-2014 fiscal year. According to the 2016-2017 independent audit report, the school had positive net assets of \$1,258,921 and net income of \$301,656. The 2017-2018 First Interim projects positive net assets of \$1,293,605 and net income of \$34,684.</p> <p>According to the 2016-2017 independent audit report, Magnolia Science Academy 6 is one of 10 schools operated by Magnolia Educational & Research Foundation (MERF). MERF currently has five 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 \$21,478,410 and net income of \$616,950. MERF, without the charter schools, reported negative net assets of (\$766,778) and a net loss of (\$793,576), which was the result of a negative equity transfer of (\$768,450) to MERF and asset write-offs of (\$348,866) absorbed by MERF in light of the closure of MSA Santa Clara (a non-LAUSD authorized MERF school). MERF’s 2016-2017 independent audit report (in Note 17), states: “On July 1, 2016, the Board of MERF voted to close MSA Santa Clara, and to transfer the June 30, 2016 operating deficit of (\$731,580) to MERF. MSA Santa Clara also had an additional loss during 2016-2017 in the amount of (\$36,870) for miscellaneous revenues repaid and expenses directly related to final settlement of MSA Santa Clara for a total deficit of (\$768,450).” MERF’s 2016-2017 independent audit report also describes the absorption of MSA Santa Clara’s remaining assets and liabilities assumed by MERF resulted as an extraordinary item that led to write-offs of accounts receivable and fixed assets in the amount of (\$348,866).</p> <p>According to MERF, in 2016-2017, MSA 6 paid annual management fees of \$167,776 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>	



Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition is strong.

	2013-2014 (Audited Actuals)	2014-2015 (Audited Actuals)	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (First Interim)
Net Assets	\$64,462	\$474,557	\$957,265	\$1,258,921	\$1,293,605
Net Income/Loss	\$415,923	\$410,095	\$482,708	\$301,656	\$34,684
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0

2. March 2015 Settlement Agreement Status

On or about March 20, 2015, LAUSD and MERF entered into a Settlement Agreement, whereby the parties agreed to resolve a lawsuit filed by MERF when the District rescinded the conditional renewals of Magnolia Science Academy 6, 7, and 8. The terms and conditions set forth in Paragraph 8 of the Settlement Agreement stated: “MERF agrees to be subject to fiscal oversight during fiscal year 2015-16 by the Fiscal Crisis & Management Assistance Team (FCMAT), or a reasonably equivalent fiscal organization, which would oversee MERF’s fiscal operations.” *Please refer to Item 22 of the Notes section for further details.*

As part of the renewal process for Magnolia Science Academy 4 (MSA 4) and Magnolia Science Academy 5 (MSA 5), in November 2017, MERF provided the final management letter from FCMAT (dated August 25, 2017), and the first two management letters from the School Services of California (SSC) team (dated August 25, 2017, and October 16, 2017, respectively). MSA 4 was approved by the LAUSD Board of Education with fiscal benchmarks, including extended oversight by SSC. Based on the December 4, 2017 amended oversight service agreement between School Services and MERF, SSC’s original scope of work for its oversight review was extended to cover the months of January 2018 through April 2018, with field work and management letters addressing SSC’s review for these four months slated for completion by June 30, 2018. Based on the January 9, 2018 email confirmation between SSC and the Charter Schools Division (CSD), it was agreed that SSC’s extended four-month review would cover a sample of financial transactions for MSA 4, 6, 7 and 8 (the current LAUSD-authorized MERF charter schools, with the exception of MSA 5). MSA 5’s charter



renewal was denied by the LAUSD Board of Education on November 7, 2017 (based on the school’s academic performance), but was subsequently approved by the Los Angeles County Office of Education (LACOE).

Based on the CSD’s 2017-2018 oversight visit and review of a sample of check disbursements and credit card transactions, the CSD noted that MERF had made significant improvements in its accounting and fiscal practices (based on FCMAT’s and SSC’s recommendations), including its implementation of an enhanced, customized software system (i.e., COOLSIS). Benefits of MERF’s improved system include: 1) MERF’s Board-approved budgets are uploaded to the purchasing software and are now part of the purchasing and payment approval process; 2) Purchase requisitions, purchase orders, and purchase approvals are now managed within the COOLSIS system; and, 3) Vendor information and resource codes are now system-required before MERF sends any request for approval. Although the CSD did note discrepancies through its review of a sample of check disbursements and credit card transactions, these discrepancies occurred prior to MERF’s implementation of its enhanced COOLSIS system (which commenced in approximately October 2017). The discrepancies in question are detailed in the “**Areas Noted for Further Growth and/or Improvement**” section below.

In summary, the CSD recognizes the progress made by MERF towards fulfilling the fiscal oversight requirements set forth in Paragraph 8 of the March 2015 Settlement Agreement (i.e., since the 2016-2017 oversight visit). The CSD will continue to monitor SSC’s findings and recommendations for the prescribed four-month period spanning from January 2018 through April 2018. Furthermore, the CSD will continue to monitor MERF’s compliance with fiscal oversight by SSC and MERF’s progress in remedying the findings from SSC through oversight.

Areas Noted for Further Growth and/or Improvement:

Through conducting fiscal oversight and analyzing the data below, the Charter Schools Division requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the five MERF charter schools that are currently authorized by LAUSD. The Charter Schools Division reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with MERF’s Magnolia Public Schools Financial Policies and Procedures Manual (P’s & P’s). 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 in each charter school’s Annual Performance-Based Oversight Visit Report, with the exception of the fiscal condition and/or the segregation of duties reviews, which are school-specific and reviewed separately for each MERF charter school.

1. Bank Reconciliation Reports

Page 1 of the CSH107 Bank Account Reconciliations provides guidance concerning bank account reconciliations.

The policy reads: “**Responsibilities:** Chief Financial Officer [CFO] or designee is responsible for review and approval of all reconciliations.” “**Bank Statement Preparation:** After receipt of the monthly bank statement and/or online printing of the monthly bank statement, Back-office accountant should prepare the monthly bank reconciliation by the 20th of the following month.”



Based on the CSD’s review of the bank statements and bank reconciliation reports for the months of July 2017 through December 2017, it was noted that the bank reconciliation reports showed no evidence of reviews or approvals by MERF’s CFO or designee. Further, the preparation and review/approval dates of the bank reconciliation reports were also omitted, hence, the CSD’s assessment regarding the school’s timely preparation/review of the reports could not be determined. In addition, the CSD noted that FCMAT, per its August 25, 2017 management letter, made a recommendation related to “Bank Statements and Reconciliations,” which states: “Include the signatures of the individual who prepared the bank statement reconciliation and the individual who reviewed/approved it, and the respective dates of same, on the reconciliation documents.”

As a result of the above observation, MERF’s CFO advised the CSD that MERF’s Senior Financial Analyst reviews the monthly bank reconciliation reports via email. Further, effective immediately and moving forward, MERF declared that it would implement a means of documenting the signatures of the bank reconciliation report reviewers and the report review dates.

2. Credit Cards

Page 2 of the CSH111 CREDIT CARDS AND DEBIT CARDS section states: “It is the policy of the Organization to provide credit cards to authorized members of the Organization staff in the performance of their duties and responsibilities.”

Based on the CSD’s review of a sample credit card statements and supporting documentation, the CSD noted that the credit card accounts for three of the five LAUSD-authorized Magnolia charter schools (i.e., MSA 4, 7 and 8), were all assigned to the former MERF CFO (who left the organization in November 2016). However, these accounts remained active until February 5, 2018. The CSD also noted that some of the aforementioned former MERF CFO’s credit card accounts continued to incur charges and/or delinquent fees. In addition, the former MERF CFO’s credit card account with MSA 8 incurred fraudulent charges in August 2017. MERF confirmed that refunds of all fraudulent charges had been received by MERF as of the date of this report, and, as of February 5, 2018, all credit card accounts under the former CFO’s name had officially been closed.

The CSD recommends that the school and MERF ensure that all credit card transactions are monitored and reviewed timely. Further, in the event that the credit card holder is no longer working for the organization, the CSD recommends that MERF ensure that any automatic payments are stopped, all credit card balances are paid in full, and all credit card accounts associated with former members of the organization are closed immediately, to prevent potential fraudulent transactions, late fees, and/or finance charges to these credit cards.

The CSD will continue to monitor these issues through oversight.

3. Automated Clearing House (ACH)/Recurring Automatic Payments

Based on the CSD’s review of a sample bank statements and supporting documentation, it was noted that two ACH transactions for Ready Refresh, listed below, included late fees in the amount of \$10, pertaining to invoices for the months of February 2017 and March 2017 for MSA 4 and MSA 6. The table below also illustrates the ACH transactions by MERF for recurring automatic



payments. However, MERF’s Magnolia Public Schools Financial Policies and Procedures Manual makes no reference to ACH and recurring automatic payment processes.

The CSD recommends that MERF update its P’s & P’s to provide guidance in this area, including clarification regarding permissible recurring payments, and delineate the approval and review processes pertaining to ACH transactions and recurring automatic payments.

Date	Vendor	Check Number	Description	Check Amount	School
4/3/2017	Ready Refresh	DB040317-1	DB040317-1; Ready Refresh	\$ 1,023.23	MSA 4
4/5/2017	Ready Refresh	DB040517	DB040517; Ready Refresh	\$ 439.69	MSA 6
9/25/2017	Arc Inc.	82720	ASES Grant October 2017	\$ 30,000.00	MSA 8

Other Observations:

1. During the 2017-2018 fiscal oversight process, the CSD noted instances whereby MERF did not respond or provide documentation/information pertaining to the CSD’s requests within the CSD’s stated deadlines. Education Code section 47604.3 requires that charters “promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding financial records, from its chartering authority.” Failure to timely respond to the CSD’s requests or inquiries constitutes a violation of the terms of the charter with LAUSD, as well as applicable state law and, in this instance, may impact the school’s 2018-2019 fiscal rating.

The CSD communicated with MERF’s CFO (initially via telephone, and again, via email, on 3/14/2018), regarding MERF’s need to improve the timeliness of its responses to the CSD. MERF’s CFO indicated that she and the MERF team would work on meeting the CSD’s deadlines so that timeliness would not continue to be an issue. The CSD will continue to monitor this issue through oversight.

Date	Email or Phone Correspondence (sent by the CSD staff)	Email Recipients	Email Copied to	Comments
02/16/18	CSD – sent an email requesting written responses from the CFO, due COB 02/23/18.	CFO	Senior Financial Analysts, FOA	



02/27/18	CSD - sent follow-up email with a new deadline of 03/01/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	The CSD sent a reminder for documentation not provided, that was originally due on 02/23/18.
03/01/18	CSD – sent email requesting a copy of MERF’s 2016-2017 Audited Financial Report, due COB 03/02/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	
03/05/18	CSD - sent email requesting a phone call with the CFO.	CFO, Senior Financial Analyst	Senior Financial Analysts, FOA	The CSD communicated the need for a phone call to clarify additional questions.
03/06/18	CSD – sent email, once again requesting a conference call with the CFO, and reminding MERF of previous request with a due date of COB 03/02/18.	Senior Financial Analyst	CFO, Senior Financial Analyst; EdTec	The CSD communicated a new timeline of 03-07-18 by 12:00 noon.
03/09/18	CSD – sent a follow-up email communicating the need to connect with the CFO to finalize oversight report.	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	On 03/09/18, the CSD received a voice message from the CFO following up on the prior request due on 03-07-18.

2. Based on the CSD’s review of a sample check disbursements, the CSD noted the instances listed in the table below, whereby the documentation provided did not contain itemized receipts for the related purchases, even though the reimbursements were supported by other documentation. The CSD recommends that, consistent with recommended industry practices (as referenced in the 2017 California Charter School Accounting and Best Practices Manual published by FCMAT), MERF update its fiscal policies and procedures to require original, detailed receipts for all purchases made via check disbursements or credit cards. In addition, the CSD noted that, per FCMAT’s August 25, 2017 management letter, FCMAT made the following recommendations related to “Accounts Payable,” which states: “1) Pay invoices timely and 2) Require itemized receipts for transactions.”

Date	Vendor	Check Number	Description	Check Amount	School
11/21/2016	Brad M.	52267	Reimb: El Pollo Loco Lunch for Staff	\$ 324.16	MSA 5
5/19/2017	Frances T. Cameron	82630	Reimb: Mileage & Dinner	\$ 172.41	MSA 8

3. Based on the CSD’s review of the MERF Board meeting minutes, and per confirmation received from the Sr. Financial Analyst of MERF, the CSD noted that the governing board meeting minutes provided by MERF did not evidence its receipt, review, and discussion of the CSD’s 2016-2017 Annual Performance-Based Oversight Visit reports (please refer to Item 14 in the Notes section below). The CSD recommends that, beginning in 2017-2018, MERF present and discuss the CSD’s Annual Performance-Based



<p>Oversight Reports with its governing board, and document said discussion regarding same. This is one of the required fiscal items in the CSD’s Annual Performance-Based Oversight Visit Preparation Guide, beginning in 2017-2018.</p> <p>The recommended actions and/or the specific fiscal policies and procedures referenced in the “Other Observations” section of this report will be reviewed by the Charter Schools Division as part of the next oversight visit. The observed results may be factored into the school’s rating for next year.</p>	
<p>Corrective Action Required:</p> <p>The governing board and leadership team of the charter school are responsible for managing the day-to-day operations of the school. Thus, the CSD’s recommendations concerning the above-noted findings and observations should be discussed at MERF’s next board meeting, but, in any event, no later than 60 days following the school’s receipt of this report. After the schools’ 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 staff will continue to monitor these issues through oversight.</p>	

**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2017 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 July 2017 through December 2017. Selected the months of July 2017 through December 2017 for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. Citi Bank – 5041 MSA Bell (Checking)
 - b. Citi Bank – 6769 MSA 4 (Checking)
 - c. Citi Bank – 6694 MSA 5 (Checking)
 - d. Citi Bank – 6121 MSA 6 (Checking)
 - e. Citi Bank – 2703 MSA 7 (Checking)
3. Reviewed credit card statements from May 2017 through October 2017 for all the credit card accounts below (except for the statements related to the accounts in the name of the former CFO as specified below). Selected the months of January 2017 through October 2017, where applicable, for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. American Express, credit card ending in 1003 (Former CFO – MSA 4) - January 2017 through July 2017
 - b. American Express, credit card ending in 1004 (CFO – MSA 4)
 - c. American Express, credit card ending in 1002 (CFO – MSA 5)
 - d. American Express, credit card ending in 1000 (CFO – MSA 6)
 - e. American Express, credit card ending in 1005 (Former CFO – MSA 7) - January 2017 through October 2017
 - f. American Express, credit card ending in 1007 (CFO – MSA 7)
 - g. American Express, credit card ending in 1000 (Former CFO – MSA 8) - January 2017 through May 2017, and August 2017 through October 2017
 - h. American Express, credit card ending in 1006 (CFO – MSA 8)
4. Reviewed the following 39 checks/debit transactions. Discrepancies were noted for further growth and/or improvement above.
 - a. Check numbers: 42338, 62329, 52267, 52273, DB120916, 42357, 82525, 52290, 72610, 82535, 42385, 82554, 82571, 62400, 82585, 52328, DB040317-1, 72722, 52346, 72741, 82630, 42454, 62472, 42467, 72780, 62471, 82663, 72801, 72803, 62496, DB062817, 42499, 52421, 82720, 52445, 42548, 82752, DB111417 and 82755.
5. Per the 2016-2017 audit report, the school's cash and cash equivalents is \$754,059, and total expenditures equal \$1,731,325. Therefore, the school's cash reserve level is 43.5%, 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 Bell and MSA 6. No discrepancies were noted.
8. MSA 6 did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
9. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
10. Governing board meeting minutes reflecting the adoption of the 2017-2018 budget were provided.



11. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
12. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
13. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
14. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were *not* provided. See the CSD's recommendation in the "Other Observations" section above.
15. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
16. Governing board meeting minutes reflecting the discussion of the most current independent audit report and resolution of any audit findings, including material weaknesses, or deficiencies were provided.
17. Evidence of MSA 6 offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
18. Equipment inventory was provided.
19. The 2017-2018 LCAP was submitted to LAUSD.
20. The EPA allocation and expenditures are posted on the charter school's website.
21. The 2016-2017 audited and unaudited actuals nearly mirror each other.
22. March 2015 Settlement Agreement (further details related to Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above):

Pursuant to the March 2015 Settlement Agreement, MERF entered a study agreement with FCMAT to review a sample of financial transactions for all eight Magnolia schools then-authorized by LAUSD, for the 12-month period spanning from July 2015 through June 2016. Given the significant delays by MERF, FCMAT was unable to perform its obligations, and documented such to MERF and LAUSD in its management letters issued during 2015-2016. On August 3, 2016, FCMAT entered into an Amended Study Agreement with MERF (at MERF's request). The Amended Study Agreement's scope of work was truncated to include a review of July 2015 (for all eight Magnolia schools then-authorized by LAUSD), followed by reviews consisting of a sampling of financial transactions and reports for August 2015, May 2016 and June 2016 (for MSA 6, MSA 7, and MSA 8 only).

Due to MERF's failure to timely respond to FCMAT's document requests and other significant reasons stated in the findings of fact in support of denial of the renewal charter petition, the LAUSD Board of Education approved the CSD's denial recommendations for MSA 1, MSA 2, and MSA 3 on October 18, 2016. MSA 1, 2 and 3 were subsequently approved by LACOE.

In response to the CSD's request pertaining to MERF in March 2017, FCMAT indicated that it was unable to move forward with a study agreement for the review and testing of MERF schools' 2016-2017 financial transactions. As such, the CSD subsequently concurred (on May 15, 2017) with the proposal that School Services of California be contracted by MERF to continue the fiscal oversight started by FCMAT.

See the current status on MERF's compliance with the March 2015 Settlement Agreement under Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy 6

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/14/2018

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

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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><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The two most current audits show no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other. 	<p><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The most current audit shows no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school generally adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other.



<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>15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement</p> <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> o Most current financial reports presented to the governing board o Employee handbook o Student handbook o Salary schedules/benefits/information o Budget development process o Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location o The most current approved petition o Administration/school contact o School calendar o Enrollment policies and procedures o Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <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> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> o Most current financial reports presented to the governing board o Employee handbook o Student handbook o Salaries schedule/benefits/information o Budget development process o Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location o The most current approved petition o Administration/school contact o School calendar o Enrollment policies and procedures o Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Existing Schools (based on the most current audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 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); 2. All vendors and staff are paid in a timely manner; 3. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 4. Governing board adopts the annual budget; 5. The EPA allocation and expenditures are posted on the charter school’s website; 6. The LCAP is submitted to the appropriate agencies; 7. Have an audit conducted annually by an independent auditing firm; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; and 9. There is no apparent conflict of interest. <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The cash balance at the beginning of the school year is positive; 2. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 3. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 	<p><u>Existing Schools (based on the most current audit):</u> 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>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<ol style="list-style-type: none">4. 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;5. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;6. Current audit shows no material weaknesses, deficiencies and/or findings;7. Charter school adheres to the governing board approved Fiscal Policies and Procedures;8. Governing board approves any amendment(s) to the charter school's budget; and9. Governing board approved LCAP is posted on the charter school's website. <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>



<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>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division. 2. 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. 3. 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. 4. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues c. Projected expenses and revenues have no significant variance from budget 5. As a practice, the governing board receives and reviews the charter school's financial reports as evidenced by the governing board meeting minutes. 6. The LCAP is submitted to the appropriate agencies. 7. The EPA allocation and expenditures are posted on the charter school's website, if applicable. <p><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>New Schools:</u></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><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



LOS ANGELES UNIFIED SCHOOL DISTRICT **CHARTER SCHOOLS DIVISION**

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT **2017-2018 SCHOOL YEAR** **MAGNOLIA SCIENCE ACADEMY BELL**

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 Name:		Magnolia Science Academy BELL (PSC)			Location Code:	5166
Current Address:		City:	ZIP Code:	Phone:	Fax:	
6411 Orchard Avenue		Bell	90201	323-826-3925	323-826-3926	
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2015 to June 30, 2020			5	South		
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:	
488		492	6 th – 8 th		6 th – 8 th	
Total Number of Staff Members:	37	Certificated:	23	Classified:	14	
Charter School's Leadership Team Members:		Jason Hernandez, Principal; Arturo Prado, Dean of Students; Maria Mendoza, Dean of Academics; Brenda Lopez, Dean of Culture				
Charter School's Contact for Special Education:		Maria Mendoza				
CSD Assigned Administrator:	Yolanda Jordan		CSD Fiscal Services Manager:	Lourdes Echavarria		
Other School/CSD Team Members:		Helena Yoon-Fontamillas				
Oversight Visit Date:		February 6, 2018		Fiscal Review Date (if different):	February 1, 2018	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):		PSC		LAUSD Co-Location Campus (if applicable):	Orchard Academies	
				DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:		

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
3	3	3	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. 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 2017-2018*. 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	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>G1: 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)</p> <ul style="list-style-type: none"> As evidenced in Binder #1, there is evaluation protocol that details how and when school leaders are evaluated. Additionally, it measures school leaders using the California Professional Standards for Education Leaders (CPSELs) While there is evidence of a Superintendent Performance Evaluation Form, it recommended that the Magnolia Public School (MPS) Board create an evaluation protocol for the CEO/Superintendent of MPS. <p>G4: 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 as evidenced by reviewing MPS board meeting minutes and agendas, as well as the ESSA Grids at school sites.</p> <p>G5: The Governing Board monitors school performance and other internal data to inform decision-making</p> <ul style="list-style-type: none"> As evidenced in Board meeting agendas, minutes, and Academic Committee meeting minutes, academic “Glows, Grows and Next Steps” are discussed to inform decisions regarding each MPS school’s academic trajectory <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p><u>Corrective Action Required</u></p> <p>None</p> <p>Notes:</p> <p>Other: The Magnolia Public Schools governing board is encouraged to continue discussions and supports at the school site level in the incorporation of STEM, STEAM, or STREAM within different content areas and classrooms.</p> <p>UPDATE regarding the Settlement Agreement with LAUSD: Magnolia Education and Research Foundation (MERF) and School Services California executed an amendment to the original contract on 12/12/17 to extend the oversight services through July 31, 2018. This amendment extended the scope of work to cover the months of January through April 2018, with field work and management letters addressing these four months by June 30, 2018.</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy BELL (PSC)

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/6/2018

The Charter School Division will continue to monitor MERF's compliance of the fiscal oversight provision required in the March 2015 Settlement Agreement between LAUSD and MERF through the end of MSA Bell's current charter term.

On 11/7/17 the LAUSD BOE voted on non-renewal for MSA 5.
All details are delineated in the Findings of Fact BOE Report #179-17/18.

****NOTE: 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.***



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"> Governing Board (composition, structure, roles and responsibilities) committees/councils, including but not limited to those mandated by laws or regulations evaluation of school's executive level leadership 		
Performance	Rubric	Sources of Evidence
	<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 (B1: 1) <input checked="" type="checkbox"/> Bylaws (B1: 2) <input checked="" type="checkbox"/> Board member roster (B1: 3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars and agendas <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1: 7) <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"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act 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 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 		
Performance	Rubric	Sources of Evidence



Performance	<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 and minutes (B1: 4) <input checked="" type="checkbox"/> Board meeting calendar (B1: 5) <input checked="" type="checkbox"/> Brown Act training documentation (B1: 8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1: 9) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
Performance	<input 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 checked="" 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 (B1: 4) <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1: 10) <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation (B1: 11) <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) (B1: 12) <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process (B1: 13.1) <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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements (B1: 13.2) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

<p><i>The Governing Board has a system in place to ensure:</i></p> <ul style="list-style-type: none"> 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 ongoing monitoring of the school’s implementation of its LCAP action plans and progress toward LCAP goals 		
	Rubric	Sources of Evidence
Performance	<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 (B1: 4) <input checked="" type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making (B1: 14) <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

<p><i>The Governing Board has a system in place to ensure fiscal viability:</i></p> <ul style="list-style-type: none"> The school is fiscally strong and net assets are positive in the prior two independent audit reports. 		
	Rubric	Sources of Evidence
Performance	<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 and net assets are negative in the most current independent audit report, or 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 and net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division	<input type="checkbox"/> Board meeting agendas and minutes (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input 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.

	Rubric	Sources of Evidence
Performance	<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, or 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, or 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 (B1: 4) <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1: 15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p>A1: The majority of subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17</p>	
<p>A2: The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17</p>	
<p>A3: The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median</p>	
<ul style="list-style-type: none"> • MSA Bell’s schoolwide percentage of student who Met and Exceeded Standards on the 2017 SBAC in ELA was 44.96%, compared to the Resident Schools Median at 29.06%. 	
<p>A4: The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is at a rate higher than the Resident Schools Median</p>	
<ul style="list-style-type: none"> • MSA Bell’s schoolwide percentage of student who Met and Exceeded Standards on the 2017 SBAC in Math was 22.38%, compared to the Resident Schools Median at 22.30%. 	
<p>A5: The school reclassifies English Learners at a rate higher than the District average</p>	
<ul style="list-style-type: none"> • MSA Bell’s reclassification rate was 38.6%, compared to the District average at 16.8%. 	
<p>A6: The school’s percentage of “At Risk” English Learners is at rate lower than the District average</p>	
<ul style="list-style-type: none"> • MSA Bell’s rate was 0.3%, compared to the District average of 5.9% 	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p>	
<p>A7: The school’s percentage of LTELs is at a rate higher than the District average</p>	
<ul style="list-style-type: none"> • MSA Bell’s rate is 14.1%, compared to the District average at 8.3% • Per school leadership, in an effort to reduce the LTEL rate, the school has taken the following steps: identify students via the Student Information System (SIS); utilize ELD portfolios (each teacher has access in order to provide the necessary accommodations to ensure appropriate supports are given to enhance language fluency); students are assigned an ELD course for at least 5 hours per week; students within the level 4 and 4 per CELDT receive pull-out services on an as needed basis to ensure progress is being made; EL students are groups within the courses that received additional supports, either with the teacher assistant or the special education teacher (as many of the EL also receive special education services); and Dr. Patricia Lyons is tasked with supporting EL student population 	
<p><u>Corrective Action Required</u></p>	
<p>None</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy BELL (PSC)

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/6/2018

Notes:

****NOTE: Upon the State Board of Education's finalization of California's School Dashboard, CSD will determine implications for the oversight report.***



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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.1) <input type="checkbox"/> Other: (Specify)

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

<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"> • Performance of all subgroups on the CAASPP 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
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input checked="" type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2015/16 to 2016/17 <input type="checkbox"/> No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.2) <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"> Schoolwide ELA data (CDE) 		
Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th 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) (B2: 1.3) <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"> Schoolwide Math data (CDE) 		
Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate equal to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th 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 rd – 8 th , 11 th Grade on the SBAC in Math is significantly lower than the Resident Schools Median. <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) (B2: 1.4) <input checked="" type="checkbox"/> Review of Data Set LAUSD Office of Data & Accountability <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 2016-2017 (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the District average <input type="checkbox"/> The school reclassifies English Learners at a rate equal to the District average <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the District average <input type="checkbox"/> The school does not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) (B2: 1.5) <input type="checkbox"/> CELDT Criterion reports (CDE) (B2: 1.5.1) <input type="checkbox"/> School internal reclassification data <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 2016-2017 (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate equal to the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the District average <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> “At-Risk” by Grade report (CDE): 2016-2017 (B2: 1.6)



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"> Providing supports for Long Term English Learners 2016-2017 (CDE) 		
Performance	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school's percentage of LTELs is at rate lower than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate equal to the District average <input checked="" type="checkbox"/> The school's percentage of LTELs is at a rate higher than the District average <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the District average <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2016-2017) (B2: 1.6)

A8: FOUR-YEAR 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"> Four-Year Cohort Graduation Rate (CDE) (high schools only) 		
Performance	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate higher than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate equal to the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate lower than the District average <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate substantially lower than the District average <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Four-Year Cohort Graduation Rate (CDE) (B2: 3.1) <input type="checkbox"/> Other: (Specify) <hr/> List of the school's A-G requirements (CSD internal use only)



***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 data as measured by:

- The school's internal assessments (with analysis of results) by subgroups and grade-levels
- 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
- Results of internal assessments show growth in student achievement in ELA and Math

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. NWEA, DIBELS, or Stanford 10) and/or other assessment instruments for which the school can demonstrate validity/reliability.

Rubric		Sources of Evidence
Performance	<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. <input type="checkbox"/> The school has not collected and/or analyzed and monitored internal assessment or other academic achievement data	<input type="checkbox"/> Internal academic performance and progress data and information (B2: 2.1 – 2.6) <input type="checkbox"/> School Internal Assessment Data Report or equivalent <input type="checkbox"/> Other: (Specify) N/A



CALIFORNIA SCHOOL DASHBOARD STATE PRIORITIES

Summary of School Performance

*Indicators A10-A19 reflect the school’s ratings on the Dashboard. For Indicators A10 –A19 the school’s ratings on the California School Dashboard will not impact the overall Student Achievement and Educational Performance Rating for 2017-2018 oversight but will provide informational areas of focus. California School Dashboard Indicators will figure into 2018-2019 oversight ratings.

Blue Green Yellow Orange Red

A10: Priority 4-3.1 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 English Language Arts

The school has achieved the performance level of Yellow

A11: Priority 4-3.2 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 Mathematics

The school has achieved the performance level of Orange

A12: Priority 4-3.5 Student Achievement English Learner Progress Indicator

The school has achieved the performance level of Blue

A13: Priority 5-3.7 Student Engagement- Chronic Absenteeism Indicator

The school has achieved the performance level of N/A

**this indicator will be available Fall 2018*

A14: Priority 6-3.8 School Climate- Suspension Rate Indicator

The school has achieved the performance level of Blue

A15: 2.5 Suspension and Expulsion Rates

The school has achieved the performance level of N/A



HIGH SCHOOLS ONLY:

A16: Priority 4-3.3 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 English Language Arts

The school has achieved the following status _____ and change _____ N/A

A17: Priority 4-3.4 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 Mathematics

The school has achieved the following status _____ and change _____ N/A

A18: Priority 5-3.6 Student Engagement-Graduation Rate Indicator

The school has achieved the performance level of _____ N/A

A19: Priority 7 & 8-3.9 Access to and Outcomes in a Broad Course of Study-College/Career Indicator

The school has achieved the following status _____ N/A

**this indicator will be available Fall 2017*

NOTES:

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

Empty box for notes on benchmarks.



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O4: 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"> • Per responses to guiding questions and discussion with school leadership, MSA Bell continues to monitor the instructional program to inform next steps to improve academic achievement for all students. The added a new program this year: MyOn. MyOn is a reading comprehension program that has been adapted and implemented to assist in the development of reading comprehension. <p>O6: 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</p> <ul style="list-style-type: none"> • At the time of the visit, per the 200 report on Welligent (timely completion of IEPs), all IEPs were being completed on time. • At the time of the visit, per the 300 report on Welligent (service tracking), out of 74 records, 4 of the records were beyond Tier 2. However, MSA Bell staff was able to give a reasonable explanation as to why these services were not on target and gave a plan to ensure services will be implemented 100% of the time. <p>O8: 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</p> <ul style="list-style-type: none"> • Per responses to guiding questions and discussion with leadership, MSA Bell leadership shared the following: <ul style="list-style-type: none"> ○ On a weekly basis, staff members meet specifically to dedicate topics of discussion. First meeting of the month is dedicated to the book club reading, “Growth Mindset Coach,” by Annie Brock. This is a month-by-month reading dedicated to support growth mindset as a professional and support the mindset of students. Second Wednesday is dedicated to supporting the following students: students with disabilities, English learners, foster youth, and homeless. Training is based on need. Professional Learning Communities (PLC) meet on the 3rd Wednesday of the month. 4th Wednesday is dedicated to department team meetings. Meetings involved looking at data and creating team strategies to increased academic achievement specific to grade levels and to help provide support and curriculum fluency within each subject matter. <p>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</p> <ul style="list-style-type: none"> • Per discussion with leadership and a review the school’s website, MSA Bell has wide variety of information available, including but not limited to the following: Title IX information in accordance with SB1375, complaint procedures, and Suicide Prevention Policy. 	



Areas Noted for Further Growth and/or Improvement

Corrective Action Required

None

Notes:

****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 (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 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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3: 1.2) <input checked="" type="checkbox"/> Evacuation route maps (B3: 1.2) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3: 1.3) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3: 1.4) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3: 1.6) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3: 1.5 and B3A:4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3: 1.7 and B3A:4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2017-2018</i> (“ESSA Grid”) (B3A) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <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 for student immunization and health screening per applicable law and terms of the charter
- school maintains an emergency epinephrine auto-injector (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen

Rubric		Sources of Evidence
Performance	<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) (B1: 10) <input type="checkbox"/> Certificate of Occupancy or equivalent (B3: 1.1) <input checked="" type="checkbox"/> Evidence that school provides for student immunization and health screening (B3: 2.2) <input checked="" type="checkbox"/> Epi-pen documentation (B3: 2.3) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

The school has:

- implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), that are applicable to the grade levels served
- demonstrated evidence of transitioning to implementation of the California Next Generation Science Standards
- obtained WASC accreditation **(high schools only)**
- implemented a system to monitor student progress toward and completion of graduation and A-G requirements **(high schools only)**
- received UC/CSU approval of courses (UC Doorways) **(high schools only)**



Rubric		Sources of Evidence
Performance	<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 <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 <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 <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	<input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3: 3.1) <input checked="" type="checkbox"/> Evidence of transitioning to CA NGSS (B3:) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3: 3.3) *new schools only <input type="checkbox"/> WASC documentation (B3: 3.4) <input type="checkbox"/> UC Doorways course approval documentation (B3: 3.5) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3: 3.6) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Classroom observation <input 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"> 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 disaggregates and analyzes data on a regular basis to address individual student needs implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD instruction, progress monitoring, assessment, and reclassification) has appointed a designee to assist and support foster youth 	
Rubric	Sources of Evidence



Performance	<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 (B3: 3.1) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 3.8) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3: 3.8) <input checked="" type="checkbox"/> Evidence of implementation of data analysis system program <input type="checkbox"/> School Internal Assessment Data Report, or equivalent <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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>		
	Rubric	Sources of Evidence
Performance	<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 (B3: 3.7) <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3: 3.9) <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
Performance	<input 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 checked="" 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) (B1: 10) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3: 3.8) <input checked="" type="checkbox"/> Self-Review Checklist (B3: 4.1) <input checked="" type="checkbox"/> Other special education documentation (B3: 4.1) <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 <input type="checkbox"/> Classroom observation (B3: 4.1) <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

	Rubric	Sources of Evidence



Performance	<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) (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <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 (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3: 4.2) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3: 4.2) <input checked="" type="checkbox"/> Evidence of data monitoring (B3: 4.2) <input type="checkbox"/> LAUSD suspension and expulsion data reports <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates
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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p><i>The school:</i></p> <ul style="list-style-type: none"> • 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 • provides faculty and other instructional staff with professional development opportunities to improve instructional practice • provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 	
Rubric	Sources of Evidence



Performance	<input 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 checked="" 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 (B3: 3.2) <input checked="" type="checkbox"/> Professional development documentation (B3: 3.7) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9

<p><i>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</i></p> <ul style="list-style-type: none"> engages in communication that notifies parents 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 (e.g., parents/guardians, students, and teachers) 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 	
Rubric	Sources of Evidence
<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 checked="" type="checkbox"/> Parent-Student Handbook (B1: 10) <input checked="" type="checkbox"/> LCAP (B3: 3.2) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3: 4.3) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3: 4.3)



Performance	<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"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3: 4.3) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3: 4.3) <input type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3: 4.3) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3: 4.3) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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
- complaint procedures**
- Title IX information in accordance with SB1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)**
- Applicable categories described in Charter School Transparency Resolution

**required on website

Rubric	Sources of Evidence
<input 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 checked="" 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 (B3:4.4) for: <ul style="list-style-type: none"> • SB 1375 Information • UCP Procedure and Forms • Complaint Forms • AB2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics



	<ul style="list-style-type: none"> • Student Achievement Information
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O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11

The school has a system in place for the evaluation of school staff designed to ensure that:

- the school’s educational program yields high student achievement
- the school complies with all applicable legal requirements

	Rubric	Sources of Evidence
Performance	<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"/> Evidence of staff evaluation system (B3: 4.5) <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
Performance	<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 2017-2018</i> form (“ESSA Grid”) (B3A: 1.1) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A: 1.2 – 1.4) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A: 1.5) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A: 2 & 3) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A) <input checked="" type="checkbox"/> Vendor certifications (B3A: 4) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A: 5) <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):



5166 Magnolia Science Academy Bell BELL (PSC)	2014-15					2015-16					2016-17				
	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		2,976,603	2,634,277	2,421,557	2,421,557		2,342,008	1,444,125	2,027,680	2,029,820		1,144,147	985,990	925,839	925,839
Current Assets		3,219,260	3,083,285	3,000,601	2,992,891		3,016,911	3,027,112	3,108,339	3,134,582		3,008,552	2,971,596	3,404,463	3,404,463
Fixed and Other Assets		15,585	22,287	22,286	21,982		14,752	144,935	140,696	140,696		139,823	139,822	183,684	183,684
Total Assets		3,234,845	3,105,572	3,022,887	3,014,873		3,031,663	3,172,047	3,249,035	3,275,278		3,148,375	3,111,418	3,588,147	3,588,147
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		14,000	75,860	126,420	138,208		103,523	109,938	168,219	271,103		170,501	5,721	255,076	221,748
Long Term Liabilities		0	0	0	0		0	0	19,469	0		0	24,000	0	0
Total Liabilities		14,000	75,860	126,420	138,208		103,523	109,938	187,688	271,103		170,501	29,721	255,076	221,748
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		3,220,845	3,029,712	2,896,467	2,876,665		2,928,140	3,062,109	3,061,347	3,004,175		2,977,874	3,081,697	3,333,071	3,366,399
Total Revenues	4,839,361	4,501,534	4,535,443	4,536,057	4,608,156	4,865,998	5,260,421	5,329,916	5,435,676	5,547,825	5,343,651	5,449,113	5,561,847	5,543,087	5,693,611
Total Expenditures	4,444,217	4,147,165	4,393,189	4,527,048	4,618,949	4,801,391	5,228,748	5,144,472	5,250,994	5,420,315	5,207,010	5,475,413	5,450,998	5,180,863	5,331,387
Net Income / (Loss)	395,144	354,369	142,254	9,009	(10,793)	64,607	31,673	185,444	184,682	127,510	136,641	(26,301)	110,850	362,224	362,224
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
Inc / (Dec) in Net Assets	395,144	354,369	142,254	9,009	(10,793)	64,607	31,673	185,444	184,682	127,510	136,641	(26,301)	110,850	362,224	362,224
Net Assets, Beginning	2,633,327	2,866,476	2,866,476	2,866,476	2,887,458	3,029,712	2,896,467	2,896,466	2,896,467	2,876,665	3,062,109	3,061,347	3,061,347	3,061,347	3,004,175
Adj. for restatement / Prior Yr Adj	0	0	20,982	20,982	0	0	0	(19,801)	(19,802)	0	0	(57,172)	(90,500)	(90,500)	0
Net Assets, Beginning, Adjusted	2,633,327	2,866,476	2,887,458	2,887,458	2,887,458	3,029,712	2,896,467	2,876,665	2,876,665	2,876,665	3,062,109	3,004,175	2,970,847	2,970,847	3,004,175
Net Assets, End	3,028,471	3,220,845	3,029,712	2,896,467	2,876,665	3,094,319	2,928,140	3,062,109	3,061,347	3,004,175	3,198,750	2,977,874	3,081,697	3,333,071	3,366,399

5166 Magnolia Science Academy Bell BELL (PSC)	Audited Financials					2017-18				
	2013-14	2014-15	2015-16	2016-17	2017-18	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	1,439,272	2,421,557	2,029,820	925,839	0		1,322,185	0	0	0
Current Assets	3,026,294	2,992,891	3,134,582	3,404,463	0		3,329,626	0	0	0
Fixed and Other Assets	21,200	21,982	140,696	183,684	0		174,987	0	0	0
Total Assets	3,047,494	3,014,873	3,275,278	3,588,147	0		3,504,612	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	160,036	138,208	271,103	221,748	0		36,414	0	0	0
Long Term Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	160,036	138,208	271,103	221,748	0		36,414	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Net Assets	2,887,458	2,876,665	3,004,175	3,366,399	0		3,468,198	0	0	0
Total Revenues	4,149,416	4,608,156	5,547,825	5,693,611	0	5,505,819	5,602,352	0	0	0
Total Expenditures	3,273,674	4,618,949	5,420,315	5,331,387	0	5,392,319	5,467,225	0	0	0
Net Income / (Loss)	875,742	(10,793)	127,510	362,224	0	113,500	135,127	0	0	0
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
Inc / (Dec) in Net Assets	875,742	(10,793)	127,510	362,224	0	113,500	135,127	0	0	0
Net Assets, Beginning	2,011,716	2,887,458	2,876,665	3,004,175	0	3,081,697	3,333,071	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	2,011,716	2,887,458	2,876,665	3,004,175	0	3,081,697	3,333,071	0	0	0
Net Assets, End	2,887,458	2,876,665	3,004,175	3,366,399	0	3,195,197	3,468,198	0	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, Proficient.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p>	3
<p>Magnolia Science Academy Bell’s (MSA Bell) fiscal condition is strong and has been upward trending since the 2014-2015 fiscal year. According to the 2016-2017 independent audit report, the school had positive net assets of \$3,366,399 and net income of \$362,224. The 2017-2018 First Interim projects positive net assets of \$3,501,526 and net income of \$135,127.</p> <p>According to the 2016-2017 independent audit report, Magnolia Science Academy Bell is one of 10 schools operated by Magnolia Educational & Research Foundation (MERF). MERF currently has five 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 \$21,478,410 and net income of \$616,950. MERF, without the charter schools, reported negative net assets of (\$766,778) and a net loss of (\$793,576), which was the result of a negative equity transfer of (\$768,450) to MERF and asset write-offs of (\$348,866) absorbed by MERF in light of the closure of MSA Santa Clara (a non-LAUSD authorized MERF school). MERF’s 2016-2017 independent audit report (in Note 17), states: “On July 1, 2016, the Board of MERF voted to close MSA Santa Clara, and to transfer the June 30, 2016 operating deficit of (\$731,580) to MERF. MSA Santa Clara also had an additional loss during 2016-2017 in the amount of (\$36,870) for miscellaneous revenues repaid and expenses directly related to final settlement of MSA Santa Clara for a total deficit of (\$768,450).” MERF’s 2016-2017 independent audit report also describes the absorption of MSA Santa Clara’s remaining assets and liabilities assumed by MERF resulted as an extraordinary item that led to write-offs of accounts receivable and fixed assets in the amount of (\$348,866).</p> <p>According to MERF, in 2016-2017, MSA Bell paid annual management fees of \$1,052,849 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>	



Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition is strong.

	2013-2014 (Audited Actuals)	2014-2015 (Audited Actuals)	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (First Interim)
Net Assets	\$2,887,458	\$2,876,665	\$3,004,175	\$3,366,399	\$3,501,526
Net Income/Loss	\$875,742	(\$10,793)	\$127,510	\$362,224	\$135,127
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0

2. March 2015 Settlement Agreement Status

On or about March 20, 2015, LAUSD and MERF entered into a Settlement Agreement, whereby the parties agreed to resolve a lawsuit filed by MERF when the District rescinded the conditional renewals of Magnolia Science Academy 6, 7, and 8. The terms and conditions set forth in Paragraph 8 of the Settlement Agreement stated: “MERF agrees to be subject to fiscal oversight during fiscal year 2015-16 by the Fiscal Crisis & Management Assistance Team (FCMAT), or a reasonably equivalent fiscal organization, which would oversee MERF’s fiscal operations.” *Please refer to Item 22 of the Notes section for further details.*

As part of the renewal process for Magnolia Science Academy 4 (MSA 4) and Magnolia Science Academy 5 (MSA 5), in November 2017, MERF provided the final management letter from FCMAT (dated August 25, 2017), and the first two management letters from the School Services of California (SSC) team (dated August 25, 2017, and October 16, 2017, respectively). MSA 4 was approved by the LAUSD Board of Education with fiscal benchmarks, including extended oversight by SSC. Based on the December 4, 2017 amended oversight service agreement between School Services and MERF, SSC’s original scope of work for its oversight review was extended to cover the months of January 2018 through April 2018, with field work and management letters addressing SSC’s review for these four months slated for completion by June 30, 2018. Based on the January 9, 2018 email confirmation between SSC and the Charter Schools Division (CSD), it was agreed that SSC’s extended four-month review would cover a sample of financial transactions for MSA 4, 6, 7 and 8 (the current LAUSD-authorized MERF charter schools, with the exception of MSA 5). MSA 5’s charter renewal was denied by the LAUSD Board of Education on November 7, 2017 (based on the school’s academic performance), but was subsequently approved by the Los Angeles County Office of Education (LACOE).



Based on the CSD’s 2017-2018 oversight visit and review of a sample of check disbursements and credit card transactions, the CSD noted that MERF had made significant improvements in its accounting and fiscal practices (based on FCMAT’s and SSC’s recommendations), including its implementation of an enhanced, customized software system (i.e., COOLSIS). Benefits of MERF’s improved system include: 1) MERF’s Board-approved budgets are uploaded to the purchasing software and are now part of the purchasing and payment approval process; 2) Purchase requisitions, purchase orders, and purchase approvals are now managed within the COOLSIS system; and, 3) Vendor information and resource codes are now system-required before MERF sends any request for approval. Although the CSD did note discrepancies through its review of a sample of check disbursements and credit card transactions, these discrepancies occurred prior to MERF’s implementation of its enhanced COOLSIS system (which commenced in approximately October 2017). The discrepancies in question are detailed in the “**Areas Noted for Further Growth and/or Improvement**” section below.

In summary, the CSD recognizes the progress made by MERF towards fulfilling the fiscal oversight requirements set forth in Paragraph 8 of the March 2015 Settlement Agreement (i.e., since the 2016-2017 oversight visit). The CSD will continue to monitor SSC’s findings and recommendations for the prescribed four-month period spanning from January 2018 through April 2018. Furthermore, the CSD will continue to monitor MERF’s compliance with fiscal oversight by SSC and MERF’s progress in remedying the findings from SSC through oversight.

Areas Noted for Further Growth and/or Improvement:

Through conducting fiscal oversight and analyzing the data below, the Charter Schools Division requests and receives fiscal documents from MERF (including bank statements, bank reconciliations, credit card statements, and check registers) for the five MERF charter schools that are currently authorized by LAUSD. The Charter Schools Division reviews these financial documents and a sampling of checks and credit card transactions across these MERF charter schools, to assess overall compliance with MERF’s Magnolia Public Schools Financial Policies and Procedures Manual (P’s & P’s). 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 in each charter school’s Annual Performance-Based Oversight Visit Report, with the exception of the fiscal condition and/or the segregation of duties reviews, which are school-specific and reviewed separately for each MERF charter school.

1. Bank Reconciliation Reports

Page 1 of the CSH107 Bank Account Reconciliations provides guidance concerning bank account reconciliations.

The policy reads: “**Responsibilities:** Chief Financial Officer [CFO] or designee is responsible for review and approval of all reconciliations.” “**Bank Statement Preparation:** After receipt of the monthly bank statement and/or online printing of the monthly bank statement, Back-office accountant should prepare the monthly bank reconciliation by the 20th of the following month.”

Based on the CSD’s review of the bank statements and bank reconciliation reports for the months of July 2017 through December 2017, it was noted that the bank reconciliation reports showed no evidence of reviews or approvals by MERF’s CFO or designee.



Further, the preparation and review/approval dates of the bank reconciliation reports were also omitted, hence, the CSD’s assessment regarding the school’s timely preparation/review of the reports could not be determined. In addition, the CSD noted that FCMAT, per its August 25, 2017 management letter, made a recommendation related to “Bank Statements and Reconciliations,” which states: “Include the signatures of the individual who prepared the bank statement reconciliation and the individual who reviewed/approved it, and the respective dates of same, on the reconciliation documents.”

As a result of the above observation, MERF’s CFO advised the CSD that MERF’s Senior Financial Analyst reviews the monthly bank reconciliation reports via email. Further, effective immediately and moving forward, MERF declared that it would implement a means of documenting the signatures of the bank reconciliation report reviewers and the report review dates.

2. Credit Cards

Page 2 of the CSH111 CREDIT CARDS AND DEBIT CARDS section states: “It is the policy of the Organization to provide credit cards to authorized members of the Organization staff in the performance of their duties and responsibilities.”

Based on the CSD’s review of a sample credit card statements and supporting documentation, the CSD noted that the credit card accounts for three of the five LAUSD-authorized Magnolia charter schools (i.e., MSA 4, 7 and 8), were all assigned to the former MERF CFO (who left the organization in November 2016). However, these accounts remained active until February 5, 2018. The CSD also noted that some of the aforementioned former MERF CFO’s credit card accounts continued to incur charges and/or delinquent fees. In addition, the former MERF CFO’s credit card account with MSA 8 incurred fraudulent charges in August 2017. MERF confirmed that refunds of all fraudulent charges had been received by MERF as of the date of this report, and, as of February 5, 2018, all credit card accounts under the former CFO’s name had officially been closed.

The CSD recommends that the school and MERF ensure that all credit card transactions are monitored and reviewed timely. Further, in the event that the credit card holder is no longer working for the organization, the CSD recommends that MERF ensure that any automatic payments are stopped, all credit card balances are paid in full, and all credit card accounts associated with former members of the organization are closed immediately, to prevent potential fraudulent transactions, late fees, and/or finance charges to these credit cards.

The CSD will continue to monitor these issues through oversight.

3. Automated Clearing House (ACH)/Recurring Automatic Payments

Based on the CSD’s review of a sample bank statements and supporting documentation, it was noted that two ACH transactions for Ready Refresh, listed below, included late fees in the amount of \$10, pertaining to invoices for the months of February 2017 and March 2017 for MSA 4 and MSA 6. The table below also illustrates the ACH transactions by MERF for recurring automatic payments. However, MERF’s Magnolia Public Schools Financial Policies and Procedures Manual makes no reference to ACH and recurring automatic payment processes.



The CSD recommends that MERF update its P's & P's to provide guidance in this area, including clarification regarding permissible recurring payments, and delineate the approval and review processes pertaining to ACH transactions and recurring automatic payments.

Date	Vendor	Check Number	Description	Check Amount	School
4/3/2017	Ready Refresh	DB040317-1	DB040317-1; Ready Refresh	\$ 1,023.23	MSA 4
4/5/2017	Ready Refresh	DB040517	DB040517; Ready Refresh	\$ 439.69	MSA 6
9/25/2017	Arc Inc.	82720	ASES Grant October 2017	\$ 30,000.00	MSA 8

Other Observations:

1. During the 2017-2018 fiscal oversight process, the CSD noted instances whereby MERF did not respond or provide documentation/information pertaining to the CSD's requests within the CSD's stated deadlines. Education Code section 47604.3 requires that charters "promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding financial records, from its chartering authority." Failure to timely respond to the CSD's requests or inquiries constitutes a violation of the terms of the charter with LAUSD, as well as applicable state law and, in this instance, may impact the school's 2018-2019 fiscal rating.

The CSD communicated with MERF's CFO (initially via telephone, and again, via email, on 3/14/2018), regarding MERF's need to improve the timeliness of its responses to the CSD. MERF's CFO indicated that she and the MERF team would work on meeting the CSD's deadlines so that timeliness would not continue to be an issue. The CSD will continue to monitor this issue through oversight.

Date	Email or Phone Correspondence (sent by the CSD staff)	Email Recipients	Email Copied to	Comments
02/16/18	CSD – sent an email requesting written responses from the CFO, due COB 02/23/18.	CFO	Senior Financial Analysts, FOA	
02/27/18	CSD - sent follow-up email with a new deadline of 03/01/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	The CSD sent a reminder for documentation not provided, that was originally due on 02/23/18.
03/01/18	CSD – sent email requesting a copy of MERF's 2016-2017 Audited Financial Report, due COB 03/02/18	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	



03/05/18	CSD - sent email requesting a phone call with the CFO.	CFO, Senior Financial Analyst	Senior Financial Analysts, FOA	The CSD communicated the need for a phone call to clarify additional questions.
03/06/18	CSD – sent email, once again requesting a conference call with the CFO, and reminding MERF of previous request with a due date of COB 03/02/18.	Senior Financial Analyst	CFO, Senior Financial Analyst; EdTec	The CSD communicated a new timeline of 03-07-18 by 12:00 noon.
03/09/18	CSD – sent a follow-up email communicating the need to connect with the CFO to finalize oversight report.	Senior Financial Analyst	CFO, Senior Financial Analyst, FOA	On 03/09/18, the CSD received a voice message from the CFO following up on the prior request due on 03-07-18.

2. Based on the CSD’s review of a sample check disbursements, the CSD noted the instances listed in the table below, whereby the documentation provided did not contain itemized receipts for the related purchases, even though the reimbursements were supported by other documentation. The CSD recommends that, consistent with recommended industry practices (as referenced in the 2017 California Charter School Accounting and Best Practices Manual published by FCMAT), MERF update its fiscal policies and procedures to require original, detailed receipts for all purchases made via check disbursements or credit cards. In addition, the CSD noted that, per FCMAT’s August 25, 2017 management letter, FCMAT made the following recommendations related to “Accounts Payable,” which states: “1) Pay invoices timely and 2) Require itemized receipts for transactions.”

Date	Vendor	Check Number	Description	Check Amount	School
11/21/2016	Brad M.	52267	Reimb: El Pollo Loco Lunch for Staff	\$ 324.16	MSA 5
5/19/2017	Frances T. Cameron	82630	Reimb: Mileage & Dinner	\$ 172.41	MSA 8

3. Based on the CSD’s review of the MERF Board meeting minutes, and per confirmation received from the Sr. Financial Analyst of MERF, the CSD noted that the governing board meeting minutes provided by MERF did not evidence its receipt, review, and discussion of the CSD’s 2016-2017 Annual Performance-Based Oversight Visit reports (please refer to Item 14 in the Notes section below). The CSD recommends that, beginning in 2017-2018, MERF present and discuss the CSD’s Annual Performance-Based Oversight Reports with its governing board, and document said discussion regarding same. This is one of the required fiscal items in the CSD’s Annual Performance-Based Oversight Visit Preparation Guide, beginning in 2017-2018.

The recommended actions and/or the specific fiscal policies and procedures referenced in the “Other Observations” section of this report will be reviewed by the Charter Schools Division as part of the next oversight visit. The observed results may be factored into the school’s rating for next year.



Corrective Action Required:

The governing board and leadership team of the charter school are responsible for managing the day-to-day operations of the school. Thus, the CSD's recommendations concerning the above-noted findings and observations should be discussed at MERF's next board meeting, but, in any event, no later than 60 days following the school's receipt of this report. After the schools' 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 staff will continue to monitor these issues through oversight.

**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2017 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 July 2017 through December 2017. Selected the months of July 2017 through December 2017 for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. Citi Bank – 5041 MSA Bell (Checking)
 - b. Citi Bank – 6769 MSA 4 (Checking)
 - c. Citi Bank – 6694 MSA 5 (Checking)
 - d. Citi Bank – 6121 MSA 6 (Checking)
 - e. Citi Bank – 2703 MSA 7 (Checking)
3. Reviewed credit card statements from May 2017 through October 2017 for all the credit card accounts below (except for the statements related to the accounts in the name of the former CFO as specified below). Selected the months of January 2017 through October 2017, where applicable, for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. American Express, credit card ending in 1003 (Former CFO – MSA 4) - January 2017 through July 2017
 - b. American Express, credit card ending in 1004 (CFO – MSA 4)
 - c. American Express, credit card ending in 1002 (CFO – MSA 5)
 - d. American Express, credit card ending in 1000 (CFO – MSA 6)
 - e. American Express, credit card ending in 1005 (Former CFO – MSA 7) - January 2017 through October 2017
 - f. American Express, credit card ending in 1007 (CFO – MSA 7)
 - g. American Express, credit card ending in 1000 (Former CFO – MSA 8) - January 2017 through May 2017, and August 2017 through October 2017
 - h. American Express, credit card ending in 1006 (CFO – MSA 8)
4. Reviewed the following 39 checks/debit transactions. Discrepancies were noted for further growth and/or improvement above.
 - a. Check numbers: 42338, 62329, 52267, 52273, DB120916, 42357, 82525, 52290, 72610, 82535, 42385, 82554, 82571, 62400, 82585, 52328, DB040317-1, 72722, 52346, 72741, 82630, 42454, 62472, 42467, 72780, 62471, 82663, 72801, 72803, 62496, DB062817, 42499, 52421, 82720, 52445, 42548, 82752, DB111417 and 82755.
5. Per the 2016-2017 audit report, the school's cash and cash equivalents is \$925,839, and total expenditures equal \$5,331,387. Therefore, the school's cash reserve level is 17.4%, 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 Bell and MSA 6. No discrepancies were noted.
8. MSA Bell did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
9. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
10. Governing board meeting minutes reflecting the adoption of the 2017-2018 budget were provided.
11. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.



12. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
13. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
14. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were *not* provided. See the CSD's recommendation in the "Other Observations" section above.
15. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
16. Governing board meeting minutes reflecting the discussion of the most current independent audit report and resolution of any audit findings, including material weaknesses, or deficiencies were provided.
17. Evidence of MSA Bell offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
18. Equipment inventory was provided.
19. The 2017-2018 LCAP was submitted to LAUSD.
20. The EPA allocation and expenditures are posted on the charter school's website.
21. The 2016-2017 audited and unaudited actuals nearly mirror each other.
22. March 2015 Settlement Agreement (further details related to Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above):

Pursuant to the March 2015 Settlement Agreement, MERF entered a study agreement with FCMAT to review a sample of financial transactions for all eight Magnolia schools then-authorized by LAUSD, for the 12-month period spanning from July 2015 through June 2016. Given the significant delays by MERF, FCMAT was unable to perform its obligations, and documented such to MERF and LAUSD in its management letters issued during 2015-2016. On August 3, 2016, FCMAT entered into an Amended Study Agreement with MERF (at MERF's request). The Amended Study Agreement's scope of work was truncated to include a review of July 2015 (for all eight Magnolia schools then-authorized by LAUSD), followed by reviews consisting of a sampling of financial transactions and reports for August 2015, May 2016 and June 2016 (for MSA 6, MSA 7, and MSA 8 only).

Due to MERF's failure to timely respond to FCMAT's document requests and other significant reasons stated in the findings of fact in support of denial of the renewal charter petition, the LAUSD Board of Education approved the CSD's denial recommendations for MSA 1, MSA 2, and MSA 3 on October 18, 2016. MSA 1, 2 and 3 were subsequently approved by LACOE.

In response to the CSD's request pertaining to MERF in March 2017, FCMAT indicated that it was unable to move forward with a study agreement for the review and testing of MERF schools' 2016-2017 financial transactions. As such, the CSD subsequently concurred (on May 15, 2017) with the proposal that School Services of California be contracted by MERF to continue the fiscal oversight started by FCMAT.

See the current status on MERF's compliance with the March 2015 Settlement Agreement under Item 2 in the **Areas of Demonstrated Strength and/or Progress** section above.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Magnolia Science Academy BELL (PSC)

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/6/2018

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

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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><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The two most current audits show no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other. 	<p><u>Existing Schools (based on the most current annual audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The most current audit shows no material weaknesses, deficiencies and/or findings; 3. All vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Charter school generally adheres to the governing board approved Fiscal Policies and Procedures; 6. Governing board adopts the annual budget; 7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 9. There is no apparent conflict of interest; 10. The EPA allocation and expenditures are posted on the charter school’s website; 11. The LCAP is submitted to the appropriate agencies; 12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and 14. Audited and unaudited actuals nearly mirror each other.



<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>15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement</p> <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salary schedules/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <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> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salaries schedule/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 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; and 6. Governing board approved LCAP is posted on the charter school’s website. <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Existing Schools (based on the most current audit):</u> 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;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 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); 2. All vendors and staff are paid in a timely manner; 3. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 4. Governing board adopts the annual budget; 5. The EPA allocation and expenditures are posted on the charter school’s website; 6. The LCAP is submitted to the appropriate agencies; 7. Have an audit conducted annually by an independent auditing firm; 8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; and 9. There is no apparent conflict of interest. <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;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The cash balance at the beginning of the school year is positive; 2. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 3. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 	<p><u>Existing Schools (based on the most current audit):</u> 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>



<p><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></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<ol style="list-style-type: none"> 4. 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; 5. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 6. Current audit shows no material weaknesses, deficiencies and/or findings; 7. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 8. Governing board approves any amendment(s) to the charter school’s budget; and 9. Governing board approved LCAP is posted on the charter school’s website. <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>



<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>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division. 2. 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. 3. 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. 4. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues c. Projected expenses and revenues have no significant variance from budget 5. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes. 6. The LCAP is submitted to the appropriate agencies. 7. The EPA allocation and expenditures are posted on the charter school’s website, if applicable. <p><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>New Schools:</u></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><u>Note:</u> 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><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>