

Youth Policy Institute Charter Schools (YPICS)

Board Meeting

Date and Time

Tuesday May 26, 2020 at 6:00 PM PDT

Location

Zoom Meeting

<https://exed.zoom.us/j/92107715604>

Meeting ID: 921 0771 5604

One tap mobile

+16692192599,,92107715604# US (San Jose)

+16699006833,,92107715604# US (San Jose)

Dial by your location

+1 669 219 2599 US (San Jose)

+1 669 900 6833 US (San Jose)

Meeting ID: 921 0771 5604

You may join the meeting via your computer and/or phone.

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:00 PM
Opening Items			
A. Record Attendance and Guests		Yesenia Zubia	1 m
B. Call the Meeting to Order		Mary Keipp	
C. Flag Salute			1 m
D. Additions/Corrections to Agenda		Mary Keipp	1 m
E. Approval of April 27, 2020 Board Meeting Minutes	Approve Minutes	Mary Keipp	1 m

	Purpose	Presenter	Time
F. Approval of May 11, 2020 Special Board Meeting Minutes	Approve Minutes	Mary Keipp	1 m

II. Communications 6:05 PM

A. Presentations from the Public	FYI	Mary Keipp	5 m
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Any persons present desiring to address the Board of Directors on any proper matter.

The YPI Charter Public Schools ("Charter Schools") welcome your participation at the Charter Schools' Board meetings. The purpose of a public meeting of the Board of Directors ("Board") is to conduct the affairs of the Charter Schools in public. Your participation assures us of continuing community interest in our Charter Schools. To assist you in the case of speaking/participating in our meetings, the following guidelines are provided:

Agenda Items: No individual presentation shall be more than five (5) minutes and total time for this purpose shall not exceed thirty (30) minutes per agenda item.

Non-Agenda Items: No individual presentation shall be for more than three (3) minutes and total time shall not exceed fifteen (15) minutes.

When addressing the Board, speakers are requested to state their name and address from the podium and adhere to the time limits set forth.

Ordinarily, Board Members will not respond to presentations and no action can be taken. However, the board may give direction to staff following a presentation.

Any public records relating to an agenda item for an open session of the Board which are distributed to all of the Board members shall be available for public inspection at 2670 W 11th Street, Los Angeles, California 90006, 12513 Gain Street, Pacoima, CA 91331, 9400 Remick Avenue, Pacoima, California 91331 and 10660 White Oak Avenue, Granada Hills, CA 91344.

Americans with Disabilities

YPI Charter Schools, Inc. adheres to the Americans with Disabilities Act. Should you require special accommodations, or more information about accessibility, please contact us at least 48 hours in advance at (818) 834-5805, (213) 413-9600 or (818) 480-6810 or at info@coronacharter.org, info@romerocharter.org. All efforts will be made for reasonable accommodations.

B. Modified Meeting Procedures During COVID-19 Pandemic	FYI	Mary Keipp	5 m
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Instructions for Presentations to the Board by Parents and Citizens

The YPI Charter Schools ("Charter Schools") welcome your participation at the Charter Schools' Board meetings. The purpose of a public meeting of the Board of Directors

	Purpose	Presenter	Time
<p>(“Board”0 is to conduct the affairs of the Charter Schools in public. Your participation assures us of continuing community interest in our Charter Schools.</p>			

**MODIFIED MEETING PROCEDURES DURING COVID-19 (CORONAVIRUS)
PANDEMIC:**

As per Executive Order N-29-20 from Governor Newsom, the meetings of the Board of Directors of the YPI Charter Schools will move to a virtual/teleconference environment using Zoom. The purpose of the Governor’s executive order is to control the spread of Coronavirus and to reduce and minimize the risk of infection by “limiting attendance at public assemblies, conference, or other mass events.” The Governor’s executive order on March 20, 2020, waived the requirement for a majority of board members to physically participate in a public board meeting at the same location. The intent is not to limit public participation, but rather to protect public health by following the Governor’s Say at Home executive order and the Los Angeles County’s “Safer at Home” Order.

Instructions for public comments at board meetings conducted via Zoom:

If you wish to make a public comment, please follow these instructions:

1. A Google Form “sign-up” will be open to members of the public 30 minutes prior to the public meeting. This Google Form will take the place of “speaker cards” available at meetings. <https://bit.ly/2Xtb5xx>
2. Speakers will fill in their names and select if they wish to address the board regarding specific agenda item (5 minutes allotted) or a non-agenda item (3 minutes allotted).
3. Speakers are asked to attend the board meeting virtually through the Zoom invitation link on the top of the agenda.
4. When it is time for the speaker to address the board, his/her name will be called by the Board Chair and the requesting speaker’s microphone will be activated.
5. Speakers should rename their Zoom profile with their real name to expedite this process.

After the comment has been given, the microphone for the speaker’s Zoom profile will be muted.

III. Items Scheduled For Information 6:15 PM

A. Committee/ Council Reports	FYI	5 m
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Each month council and committee meeting minutes are provided for the board to review. Board members will direct senior staff regarding any minutes or committee concerns that may arise.

B. Board Committee Reports	FYI	5 m
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	Purpose	Presenter	Time
C. Facilites Update	FYI	Ruben Duenas	5 m

This update is for all of the YPICS' schools.

D. Bert Corona Executive Administrator Report	FYI	Ruben Duenas	5 m
E. Monsenor Oscar Romero Executive Administrator Report	FYI	Rene Quon	5 m
F. Bert Corona Charter High School Executive Administrator Report	FYI	Larry Simonsen	5 m
G. Executive Director's Report	FYI	Yvette King-Berg	5 m
H. FY 2020-2021 Preliminary Budget	Discuss	Irina Castillo	10 m

IV. Consent Agenda Items 7:00 PM

A. Background	FYI
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All matters listed under the consent agenda are considered by the Board to be routine and will be approved/ enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board Member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board's vote on them. The Executive Director recommends approval of all consent agenda items.

B. Consent Items	Vote	Mary Keipp	5 m
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1. Recommendation to approve E-Rate consulting Renewal Proposal for Fiscal Year 2020-2021 from Learningtech.org
2. Recommendation to approve notice to authorizing district, LAUSD, to reserve the right of YPICS Schools to leave LAUSD SELPA

V. Items Scheduled For Action 7:05 PM

A. Board Resolution 2020-05 Paycheck Protection Program SBA Loan	Vote	Yvette King-Berg	5 m
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Recommendation to approve Board Resolution 2020-05 Paycheck Protection Program SBA Loan.

B. Kaiser Permanente and BenExtend	Vote	Yvette King-Berg	5 m
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Recommendation to approve the Kaiser Permanente health and BenExtend health plans.

C. Ad Hoc Nominating Board Members Committee	Vote	Yvette King-Berg	5 m
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	Purpose	Presenter	Time
Recommendation to approve Ad Hoc Committee to nominate YPICS Board Members for 2021			
D. 2019-2020 LAUSD Annual Performance-Based Oversight Visit Reports	Vote	Yvette King-Berg	5 m
Recommendation to receive and file LAUSD Annual Performance-Based Oversight Visit Reports for 2019-2020 School Year.			
E. YPICS April 2020 Financials	Vote	Irina Castillo	5 m
Recommendation to approve the YPICS April 2020 financials and check registers as submitted.			
F. ExED Contract	Vote	Yvette King-Berg	5 m
Recommendation to approve the FY2020-2021 ExED contract.			
G. ExED CALPADS Contract	Vote	Yvette King-Berg	5 m
Recommendation to approve the FY2020-2021 ExED CALPADS contract.			
VI. Announcements			7:40 PM
A. Closing Announcements	FYI	Yvette King-Berg	2 m
VII. Closing Items			7:42 PM
A. Adjourn Meeting	Vote		

Coversheet

Approval of April 27, 2020 Board Meeting Minutes

Section: I. Opening Items
Item: E. Approval of April 27, 2020 Board Meeting Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Regular Board Meeting on April 27, 2020

APPROVED

Youth Policy Institute Charter Schools (YPICS)

Minutes

Regular Board Meeting

Date and Time

Monday April 27, 2020 at 6:00 PM

Location

Zoom Meeting Conference Call

<https://exed.zoom.us/j/96894869948>

Meeting ID: 968 9486 9948

One tap mobile: +16692192599,,96894869948# US (San Jose)

+16699006833,,96894869948# US (San Jose)

Dial by your location: +1 669 219 2599 US (San Jose)

+1 669 900 6833 US (San Jose) Meeting ID: 968 9486 9948

Board Members calling in/ virtually joining from:

1200 W. 7th Street, Los Angeles, CA 90017; 405 Hilgard Avenue, Los Angeles, CA 90024; 10660

White Oak Avenue, Granada Hills, CA 91344; 17037 Chatsworth St., Granada Hills, CA 91344;

6934 Enfield Avenue, Reseda, CA 91335; 21201 W Oxnard St, Woodland Hills, CA 91367; 27201

Tourney Road, Suite 201, Valencia CA 91355

You may join the meeting via your computer and/or phone.

Trustees Present

C. Lopez (remote), D. Cho (remote), M. Green (remote), M. Keipp (remote), W. Njboke (remote)

Trustees Absent

S. Mendoza

Trustees who arrived after the meeting opened

D. Cho

Guests Present

I. Castillo (remote), L. Simonsen (remote), R. Duenas (remote), R. Quon (remote), Y. King-Berg (remote), Y. Zubia (remote)

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

M. Keipp called a meeting of the board of trustees of Youth Policy Institute Charter Schools (YPICS) to order on Monday Apr 27, 2020 at 6:05 PM.

C. Flag Salute

D. Additions/Corrections to Agenda

There were no additions or corrections to the agenda.

E. Approval of March 30, 2020 Board Meeting Minutes

C. Lopez made a motion to approve the minutes from Regular Board Meeting on 03-30-20.
W. Njboke seconded the motion.

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

Roll Call

D. Cho	Absent
W. Njboke	Aye
M. Green	Aye
C. Lopez	Aye
M. Keipp	Aye
S. Mendoza	Absent

II. Communications

A. Presentations from the Public

There were no presentations from the Public.

B. Modified Meeting Procedures During COVID-19 Pandemic

III. Items Scheduled For Information

A. Committee/ Council Reports

There were no committee/ council reports.

B. Board Committee Reports

There were not board reports.

C. Bert Corona Executive Administrator Report

The report is available on Board on Track.

D. Monsenor Oscar Romero Executive Administrator Report

The report is available on Board on Track.

E. Bert Corona Charter High School Executive Administrator Report

The report is available on Board on Track.

F. Executive Director's Report

The report is available on Board of Track.

G.

School Closure: YPICS Parent Notifications

The parent notifications are available in the board packet.

H. COVID-19 CASE: Community Notification

YPICS is saddened to say one of our middle schooler's father has passed due to COVID19. The school is currently collecting donations for the family along with donating \$300 - \$500 from the parent account.

I. Audit Update

The audit for the FY 18-19 has begun and departments are starting to pull documentation requested.

IV. Items Scheduled For Action

A. March 2020 YPICS Financials and February/March 2020 Check Registers

C. Lopez made a motion to approve the March 2020 YPICS financials along with the February/March 2020 check registers.

W. Njboke seconded the motion.

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

Roll Call

M. Green	Aye
M. Keipp	Aye
C. Lopez	Aye
W. Njboke	Aye
S. Mendoza	Absent
D. Cho	Absent

B. 18-19 Federal Form 990 and State Form 199

D. Cho arrived.

M. Green made a motion to approve the FY 18-19 federal form 990 and state form 199.

C. Lopez seconded the motion.

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

Roll Call

W. Njboke	Aye
S. Mendoza	Absent
D. Cho	Aye
M. Keipp	Aye
M. Green	Aye
C. Lopez	Aye

C. YPICS Distance Learning Plan

C. Lopez made a motion to approve the proposed YPICS distance learning plan.

D. Cho seconded the motion.

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

Roll Call

C. Lopez	Aye
D. Cho	Aye

Roll Call

W. Njboke Aye
M. Keipp Aye
S. Mendoza Absent
M. Green Aye

D. Submission of Paycheck Protection Program

D. Cho made a motion to approve the application submitted for the Paycheck Protection Program.

C. Lopez seconded the motion.

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

Roll Call

S. Mendoza Absent
D. Cho Aye
M. Keipp Aye
W. Njboke Aye
M. Green Aye
C. Lopez Aye

E. Consolidating Committees

C. Lopez made a motion to consolidate the federally regulated monitoring committees to the School Advisory Committee.

D. Cho seconded the motion.

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

Roll Call

W. Njboke Aye
M. Keipp Aye
M. Green Aye
S. Mendoza Absent
D. Cho Aye
C. Lopez Aye

V. Closed Session

A. Conference with Legal Counsel - Existing litigation

The Board moved into Closed Session at 7:00pm.

B. Conference With Legal Counsel – Anticipated Litigation

VI. Open Session

A. Action Taken

The Board reconvened Open Session at 7:53pm.

1. Existing Litigation - The Board authorized YMC legal counsel to participate along side other charter schools in a counter proposal to the anticipated litigation in regards to the anticipated litigation for dispute resolution. Motioned by Michael Green, seconded by Walter NjBoke, all ayes.

2. Anticipated Litigation - The Board authorized Gordon Reed legal counsel to settle existing litigation up to the amount that the insurance company will pay. Motioned by Michael Green, seconded by Cesar Lopez, all ayes.

VII. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:02 PM.

Respectfully Submitted,
Y. Zubia

Coversheet

Approval of May 11, 2020 Special Board Meeting Minutes

Section: I. Opening Items
Item: F. Approval of May 11, 2020 Special Board Meeting Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Special Board Meeting on May 11, 2020

APPROVED

Youth Policy Institute Charter Schools (YPICS)

Minutes

Special Board Meeting

Date and Time

Monday May 11, 2020 at 6:00 PM

Location

Join Zoom Meeting

<https://exed.zoom.us/j/98903049550>

Meeting ID: 989 0304 9550

One tap mobile

+16692192599,,98903049550# US (San Jose)

+16699006833,,98903049550# US (San Jose)

Dial by your location

+1 669 219 2599 US (San Jose)

+1 669 900 6833 US (San Jose)

Meeting ID: 989 0304 9550

Find your local number: <https://exed.zoom.us/u/aefbYwkPqs>

You may join the meeting via your computer and/or phone.

Trustees Present

C. Lopez (remote), D. Cho (remote), M. Green (remote), M. Keipp (remote), W. Njboke (remote)

Trustees Absent

S. Mendoza

Guests Present

D. Gamez (remote), Edwin Cruz, I. Castillo (remote), R. Duenas (remote), R. Quon (remote), Rommel Ruiz, Y. King-Berg (remote), Y. Zubia (remote)

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

M. Keipp called a meeting of the board of trustees of Youth Policy Institute Charter Schools (YPICS) to order on Monday May 11, 2020 at 6:10 PM.

C. Flag Salute

D.

Additions/Corrections to Agenda

Section III, item A, medical insurance review, will be presented by Ruben Duenas instead of Yvette King-Berg.

E. Previous April 27, 2020 Minutes

II. Communications

A. Presentations from the Public

There were no presentations from the Public.

B. Modified Meeting Procedures During COVID-19 Pandemic

III. Items Scheduled For Information

A. Medical Insurance Review

YPICS has chosen to change Kaiser plans from a HMO High \$10 to HMO High \$20. The cost of keeping the current plan would have been about 3.43% increase or \$28,000. Because YPICS has chosen a plan with a few higher co-pays, YPICS will be offsetting those higher co-pays with an employer paid Aflac plan called BenExtend - an effort to keep the change impact at a minimal with still decreasing costs for YPICS. BenExtend will pay employees directly for medical visits involving accidents, hospitalization, and critical illnesses which may result in getting paid more than what the co-pays cost. The total increase in benefits for the FY 20-21 will be 0.74% or roughly \$6,100.

The Board has requested the benefits work-up with exact figures and the plan summary of benefits.

B. Paycheck Protection Program

YPICS is now in receipt of the funds and a Board Resolution will be presented now that the funds have been issued.

C. Committee/ Council Reports

There were no committee reports.

D. Board Committee Reports

There were no board reports.

E. Bert Corona Executive Administrator Report

The report will be part of the next regular board meeting.

F. Monsenor Oscar Romero Executive Administrator Report

The report will be part of the next regular board meeting.

G. Bert Corona Charter High School Executive Administrator Report

The report will be part of the next regular board meeting.

H.

Executive Director's Report

The report will be part of the next regular board meeting.

IV. Items Scheduled For Action

A. Board Resolution #2020-04

C. Lopez made a motion to approve Board Resolution #2020-04 giving the Executive Director authority to reopen the schools when clear to do so following LACOE, CDE, CDC and state guidelines.

W. Njboke seconded the motion.

The Executive Director will clearly communicate to the Board when this will happen.

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

Roll Call

S. Mendoza Absent

W. Njboke Aye

D. Cho Aye

M. Green Aye

C. Lopez Aye

M. Keipp Aye

B. Budget Reductions for FY 2020-21

The Board expressed their concerns about making a decision on budget reductions without a budget being presented for review and have asked for a budget to be provided to the Board no later than May 22, 2020.

C. Lopez made a motion to approve the proposed budget reductions for FY 2020-21 with a caveat of the next year's decision only being made in the context of the provided budget.

W. Njboke seconded the motion.

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

Roll Call

C. Lopez Aye

M. Keipp Aye

S. Mendoza Absent

W. Njboke Aye

D. Cho Aye

M. Green Aye

C. Reduction in Force Policy

Board Chair, Mary Keipp has directed YPICS to provide school budgets by May 1st of each year. If reductions are to be considered, it will be in the context of the budget.

D. Cho made a motion to approve the Reduction in Force Policy.

M. Green seconded the motion.

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

Roll Call

M. Keipp Aye

S. Mendoza Absent

D. Cho Aye

W. Njboke Aye

M. Green Aye

C. Lopez Aye

V. Announcements

A.

Closing Announcements

The next board meeting is Tuesday, May 26, 2020 at 6:00pm via Zoom.

VI. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:50 PM.

Respectfully Submitted,
Y. Zubia

Coversheet

Bert Corona Executive Administrator Report

Section: III. Items Scheduled For Information
Item: D. Bert Corona Executive Administrator Report
Purpose: FYI
Submitted by:
Related Material: EA Report 5-26-20.pdf



**Executive Administrator’s Report
April 27, 2019**

The mission of the YPI Charter Schools (YPICS) is to prepare students for academic success in high school, as well as post-secondary education; prepare students to be responsible and active participants in their community; and enable students to become lifelong learners. Students at YPI Charter Schools will become active citizens who characterize the ideals of a diverse and democratic society. Students will provide service to their community, take responsibility for their own learning, and develop the habits of mind and body that will empower them to be successful in high school and beyond.

How is BCCS managing the shift to online instruction and virtual communication during the COVID-19 epidemic.

1. Access to distance learning

BCCS is now planning a 5th computer distribution day. To date, 145 devices (desktops, laptops, iPads) have been loaned to families to support distance learning. Currently, 18 more families have requested a device. Our team is working on the details of the next distribution day.

Computer Distribution								
Date	1st Distribution	2nd Distribution	3rd Distribution	4th Distribution	5th Distribution	Total	Enrollment	Percent needing Computer
Grade	3/17/20	3/23/20	4/3/20	5/1/20	Pending			
5th Grade	4	3	2	1	1	11	23	47.83%
6th Grade	14	20	5	6	5	50	120	41.67%
7th Grade	5	26	5	9	5	50	117	42.74%
8th Grade	6	23	9	7	7	52	113	46.02%
Total	29	72	21	23	18	163	373	43.70%

24 families will be provided with a Hotspot from ATT. Devices just arrived this week and will be part of the 5th computer distribution day.

Hotspot Distribution	
Grade	3/17/20
5th Grade	2
6th Grade	7
7th Grade	7
8th Grade	8
Total	24

2. Communication and Supports for Our Students and Families

Strong communication is the most powerful tool we have to support our students and families. We are following a multi-tiered approach to support our learners. As of May 18, 2020, 47% of the students are identified as Tier I; 38% are Tier II; and 16% are Tier III. Teachers are reporting each week how much they appreciate support from tutors who are helping to reach out to students. Teachers are also reporting that collaboration between RSP teachers and General Education teachers has improved during the pandemic.

Every Monday, grade level teams are talking about the support students need and make targeted calls to engage students.

All Students							
	Tier III		Tier II		Tier I		
Grade	#	%	#	%	#	%	Total Enrollment
5	1	4%	4	17%	18	78%	23
6	22	18%	39	33%	59	49%	120
7	17	15%	50	43%	50	43%	117
8	18	16%	47	42%	48	42%	113
AS	58	16%	140	38%	175	47%	373

Students with special needs have similar distribution in the Tiers of support as the whole school population. We expected that our students with special needs would be disproportionately represented in Tier II and Tier II. Our SpEd team has really made a significant effort to support the students they serve.

Students with Special Needs							
	Tier III		Tier II		Tier I		
Grade	#	%	#	%	#	%	Total Enrollment
5	1	20%	1	20%	3	60%	5
6	4	18%	8	36%	10	45%	22
7	4	33%	3	25%	5	42%	12
8	3	21%	3	21%	8	57%	14
SpEd	12	23%	15	28%	26	49%	53

Tiers are described as follows:

Tier I Support -

Student/parent is responsive to calls and student is completing assignments

Tier II Support -

Student/parent is responsive to calls but student is not completing assignments

Tier III Support -

Student/parent is not responsive to calls and student is not completing assignments

Student does not have a device to access distance learning opportunities or no internet access.

3. Preparing for the 20-21 school year

School administration continues to support the instructional and operational program. However due to the considerable uncertainty of the 20-21 school year, we have begun developing multiple plans for the next school year based on:

- A. continuing with full distance learning:

- B. a hybrid model with online and in person instruction:
- C. return to our traditional learning program.

In order to ensure that these plans are viable, staff is developing multiple learning schedules, which allow for meal program integration and safety protocols that need to be implemented. The most likely learning schedule will be a hybrid model with online and in person instruction. Students will follow an A/B schedule with 60% of the time online and 40% time on campus. Staff is preparing for the purchase of:

1. masks for staff and students,
2. face shields
3. disinfecting misters,
4. air purifiers
5. thermometers

Additionally, staff is exploring and developing various entry and exit protocols. Safety of staff and students is the greatest concern.

Coversheet

Monsenor Oscar Romero Executive Administrator Report

Section: III. Items Scheduled For Information
Item: E. Monsenor Oscar Romero Executive Administrator Report
Purpose: FYI
Submitted by:
Related Material: MORCS Executive Update 5_26_2020.pdf

MORCS Executive Administrator Board Report

5.26.2020



I. Tentative Plans for re-opening School in the Fall

Along with the YPICS Executive Team, MORCS has been preparing for the eventuality that we may open schools in the fall with guidelines for social distancing. We have considered the following elements of re-opening in order to maximize the safety of students and staff as well as do our best to provide quality instruction given the additional barriers that we may face.

- Safety:
 - Plan to sanitize classrooms at least twice a day. Looking into purchasing sanitation equipment and potentially additional custodial staff
 - Pursuing the purchasing of (extra) facemasks for all students, staff, and visitors
 - Pursuing classroom/office dividers in order to have physical barriers (where enhancing social distancing is required)
 - Pursuing purchase of air purifiers in each classroom / communal space that will clean out the air 5 times every hour
 - Reducing all class sizes by 50%
- COVID testing (Symptom check protocol)
 - Pursuing the partnership with a lab that will allow us to test students and staff for COVID once per semester
 - Will implement symptom checks for students/staff each day
 - Staff/students who have likely been exposed will be sent home for at least 14 days
- Program design
 - Monday is distance learning
 - Considering 2 potential bell schedules:
 - AM / PM cohort, with half of students attending in the morning and half in the afternoon
 - A and B daily schedule, with half of students attending 2 days a week and the other half attending during the remaining two days

II. Virtual Culmination Ceremony Update

We invited parents, students, and staff to join a Virtual Culmination Committee. The committee has met twice, surveyed all 8th graders, and come up with the following plan for Virtual Culmination:

- We will send families goodie bags (ie. yard signs, culmination decorations, etc)
 - Families will send us porch pictures/ celebration pictures with culmination decorations
- Host virtual culmination ceremony on June 19th @5pm. The ceremony will include
 - Student awards
 - Celebrate each student
 - with teacher notes
 - individual song for each cohort
 - announcement where student is going to HS
 - share porch pictures/celebration pictures with their family
 - Slideshow from 6th-8th grade

III. Technology Access for all Students

Since distance learning began, we **distributed 131 chromebooks** to families in need, while practicing appropriate Social Distancing protocols. Our updated count reveals the following data:

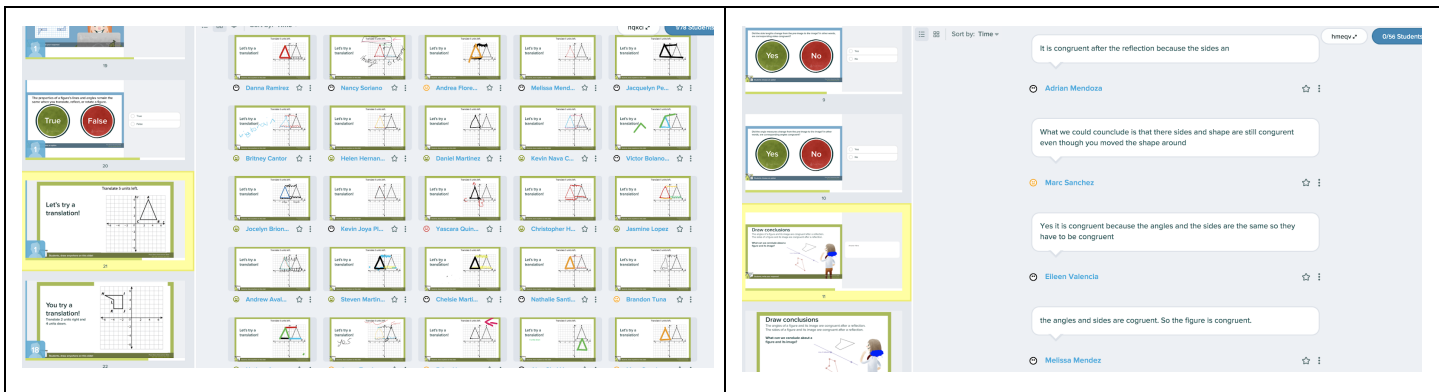
MORCS Total Enrollment	356
Access to Technology (Before Distribution)	61%
Access to Technology (After Distribution)	99%
Wireless Internet Access	96%

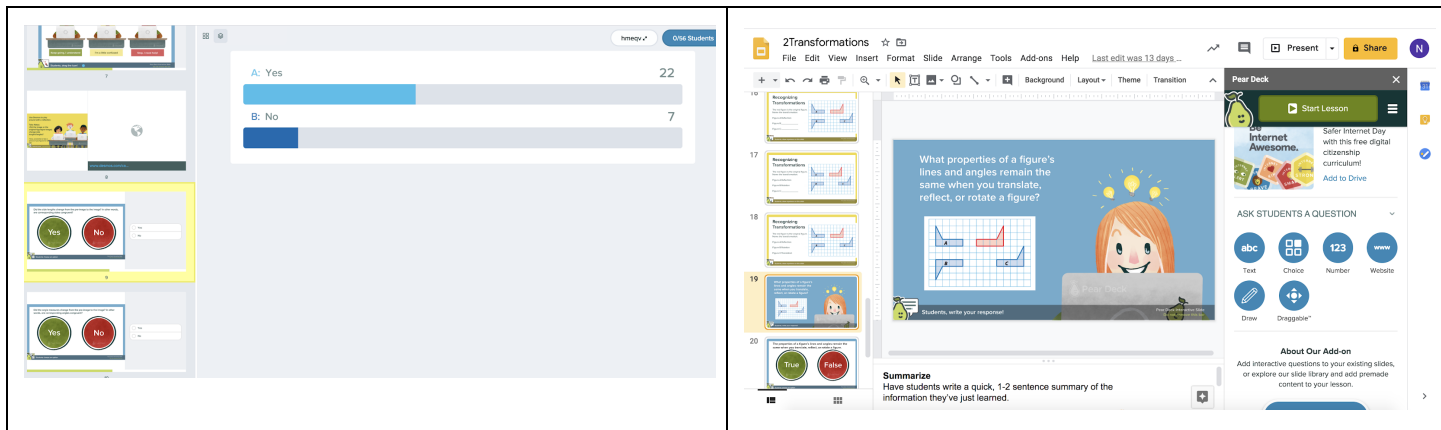
Our Operations Team is working diligently to support the remaining families in picking up chromebooks from the school and in accessing free and/or affordable wireless internet. We are also in the process of delivering hotspots to families in need of wireless internet.

IV. Distance Learning Update

MORCS is proud to be in our **10th week of Distance Learning!** Teachers are continuing to employ online instructional tools such as iReady, Achieve 3000, Khan Academy, Kahoot, Quizizz, padlet, Google Jam, Google Docs, Screencastify, and many more resources to keep students engaged with distance learning. Within the last two weeks, teachers have particularly gotten proficient at utilizing NearPod and Peardeck to enhance the interactive nature of their lessons to increase engagement and the ability to continually assess student progress towards mastering daily learning objectives.

Screenshots of Peardeck being used to collect **real-time formative assessment data** in 8th grade Math:





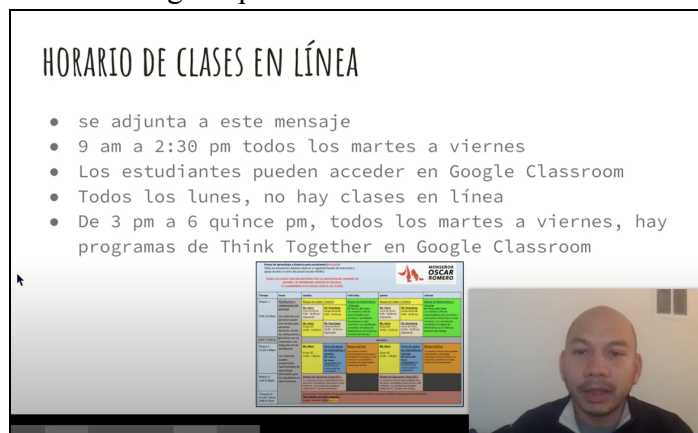
V. Communication with Families

We hosted a YPICS-Wide “Cafe con los Directores” on April 28th, using the platform CrowdCast. This allowed parents to ask questions to all YPICS leaders and also to ask parents to recruit other families who are looking to enroll their students in grade 6 or 9 next year. We have another parent meeting planned for May 26th in order to update parents on fall re-opening plans as well as Virtual Culmination preparations.

Our team has been doing the following to communicate with parents/students:

- Sending video messages to parents in English and Spanish to ensure parents are supporting our efforts to have our students attend classes
- Making individual parent calls each day when students are absent to online class
- EA (principal) has been emailing all students on a weekly basis to provide updates, to set high expectations for attendance, and to answer student questions

Video message to parents:

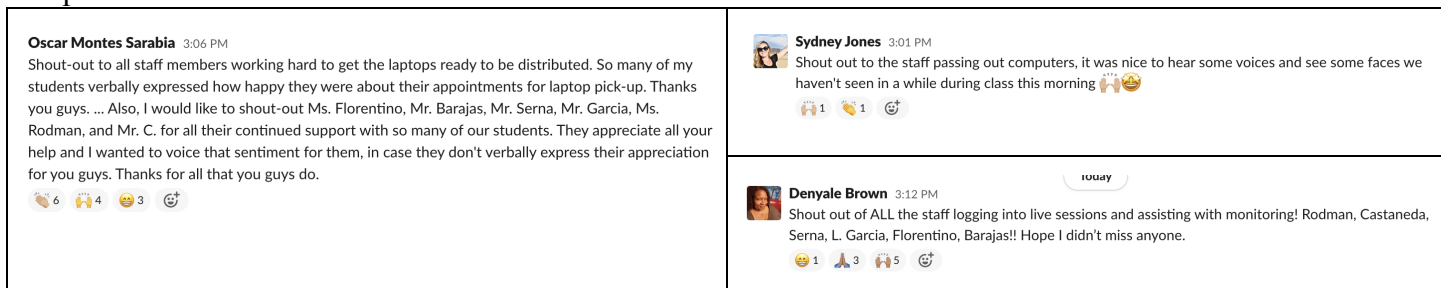


VI. Staff Communication

Staff continue to meet 3 times weekly on **Google Meet** to check-in, receive updates, and share success stories and challenges! Recently, MORCS ELA and Math teachers attended an online session with **iReady** representatives to ensure that they are fully equipped to utilize all components of the iReady online suite.

MORCS teachers also received training from representatives from **NearPod** and **Flocabulary**, in order to enhance formative assessment, engagement, and literacy instruction in all classes.

Samples of staff check-in comments are below:



Coversheet

Executive Director's Report

Section: III. Items Scheduled For Information
Item: G. Executive Director's Report
Purpose: FYI
Submitted by:
Related Material: YPICS Executive Director May 2020 Report Final.pdf



EXECUTIVE DIRECTOR'S REPORT

May 26, 2020

The mission of the YPI Charter Schools (YPICS) is to prepare students for academic success in high school, as well as post-secondary education; prepare students to be responsible and active participants in their community; and enable students to become life-long learners. Students at YPI Charter Schools will become active citizens who characterize the ideals of a diverse and democratic society. Students will provide service to their community, take responsibility for their own learning, and develop the habits of mind and body that will empower them to be successful in high school and beyond.

State:

From School Services of California –

“2020–21 May Revision Proposes LCFF Cuts and Deferrals, but Some Good News Too”

posted May 14, 2020

Overview

Today, May 14, 2020, Governor Gavin Newsom laid out the details of the May Revision to the 2020–21 State Budget, and they are as grim as expected. Through no fault of his own, the May Revision proposals bear no resemblance to the Governor’s January State Budget, when the Administration anticipated a \$5.6 billion surplus in a \$222 billion spending plan.

The purpose of this article is to provide a quick overview of Governor Newsom’s assertions regarding the revised 2020–21 State Budget. We reserve our commentary on these proposals for inclusion in our more detailed *Fiscal Report* article, to be released later this evening.

Proposition 98

As previewed last week, Governor Newsom’s revision to his 2020–21 State Budget proposal reflects significant changes to Proposition 98 in the current and budget years, totaling \$19 billion.

In future years, Governor Newsom plans to provide supplemental appropriations above the constitutionally required Proposition 98 funding level, beginning in 2021–22, and in each of the next several fiscal years.

Local Control Funding Formula

For the first time since its creation, the Local Control Funding Formula (LCFF) is facing a reduction instead of an increase. Officially, the statutory cost-of-living adjustment (COLA) is calculated at 2.31% and applied to the LCFF, but a reduction of 10% (\$6.5 billion) will be applied unless “triggered off if the federal government provides sufficient funding to backfill this cut.” As of this writing, no written details were provided as to how this cut would be applied.

CalSTRS and CalPERS

In positive news, the Administration proposes to redirect the \$2.3 billion paid in the current-year budget to the California Teachers' Retirement System (CalSTRS) and California Public Employees' Retirement System (CalPERS) towards long-term unfunded liabilities to further reduce employer contribution rates in 2020–21 and 2021–22. This reallocation will reduce the CalSTRS employer rate from 18.41% to approximately 16.15% in 2020–21, and from 18.2% to 16.02% in 2021–22. The CalPERS employer contribution rate will be reduced from 22.67% to 20.7% in 2020–21, and from 25% to 22.84% in 2021–22.

Deferrals

To address a current and anticipated cash crunch, the Administration proposes several deferrals. The first comes immediately, deferring \$1.9 billion of LCFF apportionment from 2019–20 to 2020–21. In 2020–21, the Administration proposes deferrals totaling \$3.4 billion, for a grand total of \$5.3 billion in LCFF deferrals scheduled for payment in 2021–22.

Flexibilities

In order to assist local educational agencies (LEAs) facing this potential 10% LCFF cut, the Administration proposes the following flexibilities, including:

- Exemptions if apportionment deferrals create a documented hardship
- Authority for LEAs to exclude state pension payments on behalf of LEAs from the calculation of required contributions to routine restricted maintenance
- Increases on LEA internal inter-fund borrowing limits
- Authority to use proceeds from the sale of surplus property for one-time General Fund purposes

Special Education

While the proposed \$250 million in one-time funds based on preschoolers with disabilities was dropped at the May Revision, the Administration continues to sustain the Governor's Budget proposal to increase special education base rates, updated at May Revision to \$645 per pupil (while suspending the 2.31% COLA), apportioned on a three-year rolling average of LEA average daily attendance (ADA) (allocated to Special Education Local Plan Areas).

Categorical Cuts

The Administration proposes cuts to several non-LCFF programs including: After School Education and Safety, K–12 Strong Workforce Program, CTE Incentive Grants, Adult Education Block Grant, and several others.

Learning Loss Mitigation

The May Revision proposes a one-time investment of \$4.4 billion (\$4 billion federal Coronavirus Relief Fund and \$355 million federal Governor's Emergency Education Relief Fund) to LEAs to address learning loss related to COVID-19 school closures. Funds will be allocated to LEAs offering classroom-based instruction based on a formula that takes into account the share of students most heavily impacted by school closures, including students with disabilities, low-income students, English learners, youth in foster care, and homeless youth.

“An Overview of the 2020–21 Governor’s May Revision”

posted May 14, 2020

Preface

The announcement of the May Revision to the 2020–21 State Budget today was a sobering event. Governor Gavin Newsom laid out in vivid detail how local educational agencies (LEAs) would see the COVID-19 recession translate into their budgets and programs. While not as drastic in any given area as the previewed 22% cut to Proposition 98 overall, LEAs are facing cuts to the Local Control Funding Formula (LCFF) and the few remaining categorical program funds, cash deferrals, and little flexibility to weather the storm.

But there were a few silver linings: Governor Newsom is once again providing help outside of Proposition 98 with funds to lessen retirement system employer costs and by spending discretionary federal funds on the students most affected by the pandemic. He also laid out that certain cuts could be lessened if additional funds are received from the federal government and shared the intention to boost Proposition 98 funding above the minimum guarantee once the state has recovered. And he remains committed to increasing equity in special education base funding, though having to leave behind many aspects of his January State Budget proposal, when the state was booming and its surplus growing.

What follows is our understanding of the Governor’s economic projections and proposals for the 2020–21 State Budget laid out today and how those specific actions, if adopted by the Legislature, would affect your district.

Overview of the Governor's Budget Proposals

With the early release of the Department of Finance’s revised revenue projections going into 2020–21, coupled with the Legislative Analyst’s Office *California’s Spring Fiscal Outlook*, our instinctual concerns about the economic effects of the global health crisis began to crystalize. Governor Newsom’s May Revision—which marks the start of the final stretch of State Budget negotiations culminating in an adopted State Budget by June 15—symbolizes the somber realities of these times despite all efforts not to succumb to it. Our collective concerns were tempered by the fact that before the state was crippled by the coronavirus, we were enjoying the prosperity of a sound and healthy economy and prudent State Budget choices, like stashing away over \$16 billion in our state’s savings account and maintaining a healthy wad of cash in the state’s wallet. Through the Spartan leadership of former Governor Jerry Brown, California not only survived the Great Recession and tore down its historic Wall of Debt—the albatross of the mid-2000s—we managed to reach a level of economic prosperity reminiscent of the times of our parents’ youth.

This May Revision turns a sharp corner for California, particularly for public education. Constrained by the fact that California doesn’t have a printing press, Governor Newsom’s revised State Budget proposes a multiyear effort to address the state’s budget shortfall through a combination of efforts. This includes drawing down reserves from the State Budget Stabilization Account over the next three years but uses all of the funds in the public education’s Rainy Day Fund immediately, canceling planned program expansions and new programs that were proposed in the January Budget proposal, making programmatic reductions across almost all government programs, and deferring payments such as K–12 and community college apportionments.

The Economy and Revenues

As all of us sat sheltered-in-place for the last two months, wondering when we might be able to resume our pre-COVID-19 lives, we knew that this virus was attacking our economy as well as the health of too many victims. In fact, before this crisis, the state had been enjoying the longest economic expansion in history and anticipated a State Budget surplus of nearly \$6 billion going into 2020–21. Unemployment had reached historic lows both across the nation and in the state, and the average Californian’s income increased by 25% since the Great Recession.

Now, economists expect the national gross domestic product to decline between 26% to 40% in the second quarter of this year, and California anticipates losing over 22% of revenues that we expected at the time the Governor released his relatively joyous January Budget proposal—mostly from the “big three” taxes of personal income, sales and use, and corporation tax. By his estimation, the “big three” taxes will be down from January estimates by:

- 27.2% for the Sales and Use Tax
- 25.5% for the Personal Income Tax
- 22.7% for the Corporation Tax

These revenues make up the lion’s share of the revenue the state relies on to fund most of its major programs, including education and child care. The May Revision proposal assumes that the state faces a \$54 billion State Budget deficit as it heads into the fiscal year 2020–21. According to the Governor’s May Revision, this estimate includes a \$41 billion loss in state revenue compounded by the added costs of increases in the number of Californians participating in state-subsidized programs. No one knows the path that the COVID-19 recession will take, and if the federal government will provide any additional relief beyond the Coronavirus Aid, Relief, and Economic Security (CARES) Act. Federal action could help to mitigate this devastating hit to the national and state economy and the real losses that Americans and Californians feel as a result.

Rainy Day Fund

Over the last several years, the state has been making consistent deposits into the Budget Stabilization Account (Rainy Day Fund), which currently stands at \$16.2 billion. In order to meet the constitutional requirement to balance the budget, the May Revision proposes to draw down the entirety of the state’s Rainy Day Fund over three years, including nearly half (\$7.8 billion) of the current balance in fiscal year 2020–21. The reason that the state cannot use the entire \$16.2 billion in the 2020–21 State Budget year is because Proposition 2 (2014), which created the Rainy Day Fund, stipulates that a withdrawal may not exceed half of the Rainy Day Fund balance in the first year of a budget emergency.

Proposition 98

Adopted by state voters in 1988, Proposition 98 sets in the State Constitution a series of complex formulas that establish the minimum funding level for K–12 education and community colleges from one year to the next. This target level is determined by prior-year appropriations that count toward the guarantee and (1) workload changes as measured by the change in average daily attendance (ADA), and (2) inflation adjustments as measured by the change in either per capita personal income or per capita state General Fund revenues, whichever is less.

The Governor’s January Budget provided some year-over-year increases, but COVID-19 has erased any such gains. The May Revision proposal provides a much more sobering picture for the Proposition 98 guarantee over the three budget years (2018–19, 2019–20, and 2020–21), due to a precipitous drop in

General Fund revenues as a result of the economic crisis currently being experienced across the nation, yet felt more keenly in California given the breadth and size of our economy.

The Governor's May Revision estimates that the minimum guarantee will decline approximately 23% from the 2019 State Budget Act over the three-year budget period. However, the May Revision is also proposing supplemental appropriations above the constitutionally required Proposition 98 funding level—from non-Proposition 98 funds—beginning in 2021–22 and going through 2023–24. The proposal provides for an allocation 1.5% of General Fund revenues per year up to a cumulative total of \$13 billion. While this will help accelerate the growth in the minimum guarantee in the long-term and increase the share of General Fund revenues to Proposition 98 in a Test 1 year from 38% to 40%, it does not blunt the cuts in the short-term.

In addition to other mitigation measures, the May Revision proposal also reflects the withdrawal of all of the funding in the Public School System Stabilization Account, which was projected to be approximately \$524 million in 2019–20 at the Governor's January Budget. This will help offset the decline in the minimum guarantee though it only reflects 3.5% of the total \$15.1 billion loss, so its effect is minimal.

Current- and Prior-Year Minimum Guarantee

Proposition 98 funding levels have decreased from the Governor's January Budget for both 2018–19 and 2019–20. This is a reversal from January, where the funding levels for both 2018–19 and 2019–20 had increased from the 2019 State Budget Act due largely to an increase in property tax and General Fund revenues.

For the current year, the May Revision proposal adjusts the Proposition 98 guarantee down by \$4.2 billion from the Governor's January Budget for an estimated \$77.4 billion. In 2018–19, a modest increase of \$300 million is reflected, increasing the minimum guarantee from \$78.4 billion to \$78.7 billion.

2020–21 Minimum Guarantee

For 2020–21, the May Revision proposes an even larger decline, with the Proposition 98 guarantee at \$70.5 billion, a decrease of \$13.5 billion from the Governor's January Budget and an almost \$7 billion decrease year over year. The guarantee is still projected to be based on Test 1—funding based on education's proportion of General Fund revenues in 1986–87, which is estimated at 38%. Though, as noted above, this is proposed to be increased over the next four years to 40% by 2023–24.

Cost-of-Living Adjustment and Average Daily Attendance

While the May Revision proposal acknowledges the statutory cost-of-living adjustment (COLA) of 2.31%—just slightly higher than the 2.29% included in the January State Budget proposal—it suspends the COLA in 2020–21 for all eligible programs, including LCFF, Special Education, Child Nutrition, Foster Youth, Preschool, American Indian Education Centers, American Indian Early Childhood Education, and the Mandate Block Grant. The Governor's May Revision confirms the continued decline in statewide ADA for the upcoming fiscal year—with declines going from the 0.33% estimated in January to 0.67%.

Local Control Funding Formula

As noted above, the May Revision proposal suspends the 2.31% statutory COLA. Therefore, the base grants—and subsequent grade span adjustments for the Transitional Kindergarten–3 and career technical

education—as well as the supplemental and concentration grant amounts from 2019–20 will remain the same for 2020–21.

However, the May Revision proposes an additional 7.69% cut—for a total of 10%, or \$6.5 billion—to the LCFF absent additional federal funding. The cuts are meant to proportionately reduce LCFF with the reductions taken from the base grant, which lowers the amount upon which supplemental and concentration grant funding is calculated. The effects of the cuts on individual LEAs will vary depending on the unduplicated pupil percentage of each LEA. However, on average, a 10% cut to LCFF translates to \$1,050 per ADA.

During the press conference, Governor Newsom noted that a mechanism is being included within the proposed State Budget which he is providing to the Legislature so that the reduction would be “triggered off” if the federal government provides sufficient funding to backfill the cuts.

Deferrals

Unfortunately, the May Revision proposal brings back deferrals. For those of you who were in school agencies during the Great Recession, you will recall that deferrals are a cash flow management tool for the state, which require careful cash management by school agencies as they bridge the time gap between apportionments. The Governor proposes deferring approximately \$1.9 billion of LCFF funding in June 2019–20 to July in 2020–21. Further, LCFF deferrals are needed in 2020–21, increasing by \$3.4 billion to \$5.3 billion in total apportionments deferred to 2021–22. The Newsom Administration proposes that a process be established for LEAs to seek an exemption from the 2020–21 apportionment deferrals if they create a documented hardship, similar to what was provided for some of the cash deferrals implemented during the Great Recession.

Flexibilities for LEAs

Recognizing the tremendous challenges LEAs face, the May Revision proposal attempts to balance the impact on public education stakeholders while maintaining the expectation that schools continue to make progress closing the achievement gap for students with disabilities, low-income students, English language learners, youth in foster care, and homeless youth. In order to balance these objectives, a number of proposed flexibilities are included in the Governor’s May Revision and many will require statutory changes to be implemented. The major areas of flexibility are detailed below.

Fiscal flexibilities include:

- Exemptions for LEAs if apportionment deferrals create a documented hardship
- The authority for LEAs to exclude state pension payments on behalf of LEAs from the calculation of required contributions to routine restricted maintenance
- Increased limits on LEA internal inter-fund borrowing to help mitigate the impacts of apportionment deferrals, and the maximum limit of borrowing between funds would increase from 75% to a new temporary maximum of 85%—this practice would be subject to public hearing
- The authority to use proceeds from the sale of surplus property for one-time General Fund purposes
- An extension of the statutory timelines to address the annual LEA audit due to COVID-19

Programmatic flexibilities include:

- Options for specified special education staff to utilize technology-based options to serve students

- Extension of the deadline for transitional kindergarten teachers to obtain 24 college units of early childhood education, from August 1, 2020, to August 1, 2021
- Migrant Education Program: the ability to allow summer programs to be offered through distance learning for the 2020 calendar year; the instructional minutes requirement waived for summer school instruction in 2020 (LEAs are encouraged to offer the minimum number of minutes to the extent practical); suspension of the requirement that school districts, county offices of education, and community college districts make facilities available for migrant summer programs in 2020 if facilities are closed due to COVID-19

While acknowledging the proposed flexibilities are not comprehensive or exhaustive, the administration states its openness to explore expanded flexibilities to protect core services and minimize the impact on students due to reduced funding.

Special Education

Despite the dire economic circumstances, the Governor maintains a commitment to special education and improving outcomes of students with disabilities. The proposed May Revision continues the Governor's January Budget proposal to increase special education base rates to \$645 per student (reflects suspension of the COLA). The current statewide target rate (STR) is \$557.27 so the increase per student for those LEAs receiving the average STR will be \$87.73 (15.74% increase). With the suspension of the COLA, those LEAs funded above \$645 per ADA would not receive an increase. As in January, the proposal would apportion this base funding on a three-year rolling average of LEA ADA (but still allocated to Special Education Local Plan Areas) and would maintain the current funding model's categorical programs until a later date.

The May Revision also includes \$15 million in federal Individuals with Disabilities Education Act (IDEA) funds for the Golden State Teacher Scholarship Program to increase the number of fully-prepared special education teachers in the state (this has been a long-standing shortage area).

The Governor also proposes to utilize \$7 million in IDEA funds to assist LEAs in developing regional alternative dispute resolution services and statewide mediation services for cases arising from the pandemic and distance learning service delivery for students with disabilities.

The two workgroups to study current governance and accountability structures for special education service delivery and student outcomes remain in the budget but the \$1.1 million in funding was transferred from Proposition 98 to IDEA funding. In addition, \$600,000 in federal IDEA funds are proposed for a work group to study out-of-home care funding to better align with existing provisions to provide the service and to develop an Individualized Education Program addendum for distance learning.

CalSTRS and CalPERS Relief

In times of plenty, the 2019–20 State Budget included \$3.15 billion non-Proposition 98 General Fund payment on K–14 employers' behalf to the California State Teachers' Retirement System (CalSTRS) and the California Public Employees' Retirement System (CalPERS) Schools Pool. A portion of the payment immediately paid down the CalSTRS and CalPERS employer contribution rates in 2019–20 and 2020–21 and the remaining \$2.3 billion was sent directly to the retirement systems towards the long-term unfunded liability of each system.

Instead, the Newsom Administration proposes to redirect that \$2.3 billion to further reduce employer contribution rates in 2020–21 and 2021–22. This reallocation of the same resources will reduce the

CalSTRS employer rate from 18.4% to approximately 16.15% in 2020–21 and from 18.2% to 16.02% in 2021–22. The CalPERS employer contribution rate will be reduced from CalPERS recently set rate for 2020–21 of 22.68% to 20.7% and CalPERS 2021–22 estimated rate of 24.6% to 22.84%.

Investing Federal CARES Act Funds

The Governor proposes to use discretionary federal funds available through the CARES Act to address learning loss related to COVID-19 school closures. California is receiving \$355 million total in the Governor’s Emergency Education Relief (GEER) Fund which must be used for LEAs, higher education, or other education related entities to address the impact the coronavirus pandemic has had on students and families. The state also is receiving \$9.5 billion total in the Coronavirus Relief Fund (CRF), which can be used more broadly for any necessary expenditures incurred because of COVID-19.

The Governor proposes to use the \$355 million of GEER funds and \$4 billion of the CRF money to invest \$4.4 billion total for LEAs to mitigate learning loss. Funds will be allocated to LEAs using a formula that considers the number of students with disabilities, low-income students, English learners, youth in foster care, and homeless youth served by the LEA. These funds may be used for the following activities:

- Extending the instructional school year by implementing an earlier start date or increasing the number of instructional minutes or days
- Providing additional academic services for students, such as diagnostic assessments of student learning needs, or devices and connectivity for in-classroom and distance learning
- Learning supports that begin prior to the start of the school year, and continuing into the school year
- Student supports to address other barriers to learning, such as health, counseling, or mental health services; professional development in distance-learning for teachers and parents; access to school breakfast and lunch programs; or programs to address student trauma and social- emotional learning.

In addition, the Governor also unveils in the May Revision proposal how he proposes to invest approximately \$165 million that the state is receiving in federal Elementary and Secondary School Emergency Relief (ESSER) funds, also through the CARES Act. Grants totaling \$100 million will go to county offices of education for the purpose of developing networks of community schools and coordinating health, mental health, and social service supports for high-needs students. \$63.2 million will be used to provide training and professional development for educators that is focused on closing opportunity gaps, addressing trauma-related health and mental health barriers to learning, and developing strategies to support necessary changes in the educational program, such as distance learning and social distancing. The remaining \$1.5 million of the state-level ESSER funds will be provided to the CDE for state operations associated with the COVID-19 pandemic.

Categorical Cuts

The May Revision proposes savings totaling \$352.9 million by reducing funding for various categorical programs. If federal funds materialize, then these cuts may be reversed. Funding for the following programs will be reduced by the following amounts:

- After School Education and Safety: \$100 million
- K–12 Strong Workforce Program: \$79.4 million
- Career Technical Education Incentive Grant Program: \$77.4 million
- Adult Education Block Grant: \$66.7 million

- California Partnership Academies: \$9.4 million
- Career Technical Education Initiative: \$7.7 million
- Exploratorium: \$3.5 million
- Online Resource Subscriptions for Schools: \$3 million
- Specialized Secondary Program: \$2.4 million
- Agricultural Career Technical Education Incentive Grant: \$2.1 million
- Clean Technology Partnership: \$1.3 million

Early Childhood

A hallmark of the Newsom campaign to the Governor's office, early childhood continues to be a priority in the May Revision proposal; however, even it is not spared from having to absorb its fair share of cuts to help the state address the budget deficit. Similar to other January proposals, Governor Newsom pulls back on some of the investments he planned for childcare and preschool programs when the state expected a State Budget surplus. This included funding additional child care slots and inching ever closer to achieving universal targeted preschool in California. Additionally, the May Revision proposal captures savings from programs that were funded in the 2019 Budget Act like funding for improving the quality of the workforce and the renovation of existing, as well as the construction of new, preschool and child care facilities to house anticipated growth.

After multiple years of increasing the reimbursement rates for state subsidized child development programs, the May Revision proposes to suspend the statutory 2.31% COLA and reduce the Standard Reimbursement and Regional Market Rates for child care and preschool by 10%.

You may recall that Governor Newsom proposed the creation of a new Department of Early Childhood under the California Health and Human Services Agency to consolidate all child development programs except the State Preschool Program. Given the resources necessary to create the new department, the May Revision proposal modifies that plan and instead proposes to transfer child care programs administered by the Department of Education to the Department of Social Services and funds the transfer with \$2 million in state general funds. The Governor offers that this modified proposal achieves the goal of consolidating the state's early care programs and eases the administration of collective bargaining for family childcare providers with the passage of Assembly Bill 378 (Chapter 385, 2019).

Finally, the May Revision proposes to use the \$350 million California received from the federal CARES Act for child care to hold providers harmless as a result of COVID-19, provide one-time stipends for state-subsidized childcare providers to offer care during the COVID-19 crisis, increase access for at-risk children and children of essential workers, and to ensure that families do not have to pay childcare and/or preschool fees during such difficult times.

Closing Thoughts

The Governor's May Revision is the Administration's response to the economic shutdown caused by the COVID-19 pandemic. We predict that unlike the prior year and many of the years during the Governor Brown era that not all issues will be resolved by the end of June when the State Budget is enacted. With the delay of the income tax filing deadline from April to July, the final adjustments for the 2020–21 State Budget might not be known until August or September.

LEAs should prepare their 2020–21 budgets using the assumptions in the May Revision as the building blocks for the district budget. We do not expect every assumption in the May Revision to hold true until State Budget adoption. But, in the absence of any other statutory foundation for the local agency budget,

we continue to recommend that districts use the proposals in the May Revision to develop and adopt their budgets in June.

This year, because the Governor is proposing cash deferrals similar to those used during the Great Recession, we expect that many more districts will have cash flow problems. This is particularly true if the district, using the Governor's January State Budget proposals, already had a less-than-positive certification. We recommend that districts plan to recalculate their multiyear projections immediately upon receipt of our updated Dartboard, which will be included in the May Revision Workshop materials on May 19.

Like we commented in an editorial written during the Great Recession, "remember that the only safety nets a district has are its cash reserves and the knowledge and skill of its business people." It is too early to spend down the reserve; in fact, we recommend you hang on to all you can—at least until the State Budget is actually adopted.

As the journey to the final 2020–21 State Budget continues, we pledge to keep you informed along the way. Many of you carry the wisdom acquired during the last financial crisis and we encourage you to share your knowledge with those who will be dealing with it for the first time. For those of you that this is your maiden journey, we encourage you to seek out the counsel from those who travelled before you. We will "see you" at the School Finance and Management Conference in July!

YPICS

Material Revisions

The CSD has requested that YPICS submit Material Revisions to support the documented changes in Board Structure, due to YPI's closure, based upon to the action to remove YPI as the Sole Statutory Member of the YPI Charter School, Inc by the YPICS Board in October 2019. ED King-Berg will follow up with the needed next steps to get this last step added to the next LAUSD Board Meeting for final approval. We are hopeful that the Material Revisions for YPICS will be approved at the June 16th meeting or perhaps the July meeting. We shall see!

State Budget Cuts and YPICS

The decision to non-renew the YPICS LSC lease in October 2020 at 10660 White Oak Avenue, along with the release of positions articulated in the Board Approved Reductions for YPICS, (two central office positions, the loss of one administrative school site position, on clerical position, non-core teaching positions), and the decrease in paraprofessionals, materials and resources at each site as necessary, step and column freezes, hiring freeze (accept in core-teaching positions not filled due to retirements or attrition, and a slight increase in co-pay for benefits, (from \$10.00 to \$20.00 per office visit), will bring all three budgets to a positive situation for the 2020-2021 school year without further major changes.

What we need to remember is that financial analysts are predicting a greater deficit to the

State's budget in the 2021-2022 year. This will depend on the level of unemployment and tax receipts as the economy hopefully rebounds when the closure is modified or ended.

Coversheet

FY 2020-2021 Preliminary Budget

Section: III. Items Scheduled For Information
Item: H. FY 2020-2021 Preliminary Budget
Purpose: Discuss
Submitted by:
Related Material: FY20-21 Budget YPICS Preliminary.pptx
YPICS Budget Scenarios.xlsx

FY20-21 BUDGET

YPI Charter Schools, Inc

Revenue Assumptions

- One time Federal ESSER funding (CARES Act)
 - BCCS - \$135,044
 - MORCS - \$150,638
 - BCHS - \$73,817
- LCFF -10% COLA (May revised is -7.92%)
- SB740 assumes 0% funding for Other Costs and 20% reduction to Rent Reimbursement
- PPP Loan is not included in the budget

Revenue Assumptions

- Enrollment / ADA
 - BCCS – 371 / 356.16 or 96%
 - MORCS – 350 / 337.75 or 96.5%
 - High School – 197 / 183.33 or 94.5%
- Unduplicated Count
 - BCCS – 77%
 - MORCS – 94%
 - High School – 92%
 - LAUSD – 85.40%

Expense Assumptions

- Salaries
 - Salaries Freeze
 - Staff Reduction
 - Hiring Freeze
- STRS 16.15% (decrease from 18.1%)
- Health Insurance Costs are estimated to stay the same as FY19-20
- Reduction in Field Trips
- Reduction in Travel

Expense Assumptions

- Rent
 - BCCS (\$10,300 a month)
 - M&O for MORCS \$280K + \$60K for Utilities
 - M&O contract assumes 3 years
 - Prop 39 for High School (\$227K)
 - Closing of Central Admin building in October
- MORCS Prop 1D repayment loan
- Indirect Cost – allocated based on the number of students.

Expense Assumptions

- **ExED contracts:**
 - Management and Accounting Services :
 - \$222,282 – no increase
 - CALPADS:
 - \$11,500 per school (increase from \$8,750 due to increase in complexity of CALPADS reporting)
- **CASH Flow needs**
 - Bert Corona High School will need to borrow from Bert Corona Middle during the year to support cash flow needs due to the deferrals

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

YPICS Budget Scenarios.xlsx

Coversheet

Consent Items

Section: IV. Consent Agenda Items

Item: B. Consent Items

Purpose: Vote

Submitted by:

Related Material:

1a. Board Brief to approve E-Rate Consulting Renewal Proposal for Fiscal Year 20192020 from Learning tech.org.pdf

2. Notice to LAUSD for YPICS to Leave LAUSD SELPA 2020.pdf

1b. YPICS_2020_2021_ff_Learning Tech Renewal Contract_20200517.pdf



YPI CHARTER SCHOOLS

May 21, 2020

TO: YPI Charter Schools
Board of Directors

FROM: Yvette King-Berg
Executive Director

SUBJECT: Recommendation to approve E-Rate Consulting Renewal Proposal for Fiscal Year 2020-2021 from Learning Tech.org

BACKGROUND

In 2006, Bert Corona was preparing for the first renewal after only operating for two years. At the time the LAUSD Board approved approximately 20 charters for 3 years only and BCCS was one of them. When Yvette and Ruben arrived the school only had 7 functioning computers, although the petition promised a technology rich educational experience for students. We reached out to the Millers for support to develop and write an E-rate plan to develop the technological infrastructure necessary to fulfill the petition promise.

ANALYSIS

Mark Miller and his team at Learningtech.org, including his sister Eileen Miller, have provided exceptional service at exceptionally low cost to YPI Charter Schools, beginning with Bert Corona, since 2006. For over thirteen years, federal funding has been leveraged to the maximum extent possible to ensure that YPICS students have enjoyed access to high-speed internet access that other schools have not.

The cost for the nearly daily consulting work has been minimal reflecting the commitment of Learningtech.org to support its partners to bring the highest level of technology access to schools throughout California. The labor rate is attached for board review.

RECOMMENDATION

It is recommended that the Board of YPI Charter Schools approve the renewal of the LearningTech.org E-Rate Consulting Proposal for fiscal year 2020-2021



YPI CHARTER SCHOOLS

May 21, 2020

TO: YPI Charter Schools
Board of Directors

FROM: Yvette King-Berg
Executive Director

SUBJECT: Recommendation to approve notice to authorizing district, LAUSD, to reserve the right of YPICS to leave LAUSD SELPA

BACKGROUND

In 2011, the Los Angeles Unified School District (LAUSD) reorganized its Special Education Local Plan Area (SELPA) to provide charter schools with a continuum of options for serving students with disabilities. The continuum spans from the least autonomous Option 1 to the most autonomous Charter Operated Program: Option 3 (COP3).

Since the reorganization, nearly 200 independent charter schools have embraced autonomy and responsibility in special education through COP3. This new autonomy has resulted in a steady increase in the percentage and range of students with disabilities enrolled in LAUSD charter schools.

ANALYSIS

Although the relationship with the District and the results achieved by the charter schools in COP3 have been positive, the COP3 members recognize that special education arrangements with the LAUSD SELPA are subject to change. For this reason, charter schools must take steps necessary to preserve their autonomy and infrastructure by maintaining the ability to exit the SELPA should such action be in the best interest of the charter school and their students.

The YPI Charter Schools, along with the other COP3 member schools, will submit a letter as notification that all (or selected) schools in COP3 reserve the right to exit the LAUSD SELPA effective July 1, 2021.

RECOMMENDATION

It is recommended that the Board of Directors approve the submission of the notice to the authorizing district, LAUSD, to reserve the right of YPICS to leave LAUSD SELPA.



Learningtech.org[®]

The Miller Institute for Learning with Technology

**E-Rate Consulting Renewal Proposal
Fiscal Year 2020-2021 / E-Rate Funding Year 2021-2022
YPI Charter Schools**

Learningtech.org appreciates the opportunity to provide E-Rate Consulting Services to your organization. During the past months, we facilitated application(s) for a total of **\$57,985.94** E-Rate discounts for FY2020 (7/1/2020 – 6/30/2021) with:

- Category 1 application for *continuing contracted services* that requested funding of **\$45,708.38**
- Category 1 application for *newly competed services* that requested funding of **\$12,277.56**
- Additional California Teleconnect Fund discounts are also anticipated for eligible Category 1 services

We look forward to continuing our relationship and anticipate providing Standard E-Rate Management Services for FY2021 (7/1/2021 – 6/30/2022) to your organization during fiscal year 2020 – 2021 (7/1/2020 – 6/30/2021), consistent with the attached **Scope of Work**.

These key assumptions support the next fiscal year's work:

- One (1) Category 1 application for continuing contract services
- One (1) Category 1 application for newly competed and awarded services (as needed)
- No Category 2 application. A separate consulting fee applies for Category 2 application; please request a quote if you intend to pursue Category 2 funding
- No additional schools or sites since last year. A separate consulting fee applies for additional schools or sites; please notify us immediately if you anticipate opening a new school or site in the next year
- Completion of the E-Rate planning process, including client approval signature on the E-Rate FY2021 PLANNING RECAP before the application window opens (1/13/2021¹)

The E-Rate FY2021 PLANNING RECAP (for dates of service 7/1/2021 – 6/30/2022) summarizes planning meetings, and any follow-up conversations or emails. It recaps background information and your answers to planning questions, which formulate the E-Rate actions to be taken.


Consistent with Paragraph 2 of the existing Consulting Agreement, our current agreement automatically renews annually through 06/30/22.

¹ The FY2021 Application Window is expected to be 1/13/2021 – 3/24/21. The actual FY2021 Application Window opening and closing dates are announced annually by the Universal Services Administrative Company [USAC] approximately 25 days prior to the opening. If required by USAC Window announcement, Learningtech.org dates for Client responsiveness will be adjusted.

Further, this renewal proposal notifies Client of a need for other modifications, and includes these additional considerations:

- The annual Fixed Fee amount of **\$9,350.00**, which may include a Consumer Price Index adjustment, covers the Standard E-Rate Management Services and above assumptions
- Additional costs may be incurred if mutually agreed assumptions turn out to be inaccurate or if services are requested that are outside the stated Scope of Work
- **Client participation in the application process will be responsive such that:**
 - Client approval signature on **E-Rate FY2021 PLANNING RECAP** occurs *prior to* the expected opening of the FY2021 Application Window (1/13/21). Client may purchase an extension of Learningtech.org’s Planning deadline for 20% of the annual Fixed Fee, after which best efforts, including overtime work, will be made to still meet the USAC deadline, but without a guarantee of completion
 - Client approval signature on **Vendor Award** document(s) occurs *at least two (2) weeks prior to* the expected close of the FY2021 Application Window (3/10/21). Client may purchase an extension of Learningtech.org’s Vendor Award deadline for 20% of the annual Fixed Fee, after which best efforts, including overtime work, will be made to still meet the USAC deadline, but without a guarantee of completion
- At Client’s preference, the annual Fixed Fee for the fiscal year’s work can be paid:
 - *In a single payment* with 2% discount if paid within 10 days of invoice date, *or*
 - *Quarterly, in 4 installments*, due on the 1st day of the first month of each quarter. We will assume you prefer quarterly unless we receive payment in full (less the 2% discount) within ten days of sending our electronic invoice
- Clients wishing to use payment services that charge a transaction fee (e.g., Square, PayPal, credit cards) must pay the transaction fee
- Late fees and/or finance charges up to the maximum amounts allowed by law shall be applied to past due accounts
- Clients who refer new business to Learningtech.org that result in new clients by 60 days before the application window opens will receive **\$200** credit on their next invoice

Client hereby notifies Learningtech.org of intent to renew the existing contract with the above considerations. Executed on the date(s) set forth below, by duly authorized agents for the respective parties.

The Miller Institute for Learning with Technology	YPI Charter Schools
<i>Authorized Representative For Consultant</i>	<i>Authorized Representative For Client</i>
Mark L. Miller, Ph.D.	
<i>Name</i>	<i>Name</i>
President and Executive Director	
<i>Title</i>	<i>Title</i>
	
<i>Signature</i>	<i>Signature</i>
05/17/2020	
<i>Date</i>	<i>Date</i>

Coversheet

Board Resolution 2020-05 Paycheck Protection Program SBA Loan

Section: V. Items Scheduled For Action
Item: A. Board Resolution 2020-05 Paycheck Protection Program SBA Loan
Purpose: Vote
Submitted by:
Related Material: YPICS Board Resolution 2020-05 PPP Loan Final .pdf



**RESOLUTION OF THE BOARD OF TRUSTEES
YPI CHARTER SCHOOLS, INC.
A California Public Benefit Corporation**

Board Resolution #2020-05

ACCEPTANCE OF PAYCHECK PROTECTION PROGRAM LOAN

WHEREAS, YPI Charter Schools, Inc. (“YPICS”) is a 501(c)(3) non-profit organization with fewer than 500 employees; and

WHEREAS, YPICS has received a loan from the Small Business Administration (“SBA”) Paycheck Protection Program (“PPP loan”) in the amount of \$1,527,500.00 through Pacific Western Bank; and

WHEREAS, applicants for PPP loans must certify to the following statements:

- *The Applicant was in operation on February 15, 2020 and had employees for whom it paid salaries and payroll taxes or paid independent contractors, as reported on Form(s) 1099-MISC.*
- *Current economic uncertainty makes this loan request necessary to support the ongoing operations of the Applicant.*
- *The funds will be used to retain workers and maintain payroll or make mortgage interest payments, lease payments, and utility payments, as specified under the Paycheck Protection Program Rule; I understand that if the funds are knowingly used for unauthorized purposes, the federal government may hold me legally liable, such as for charges of fraud.*
- *The Applicant will provide to the Lender documentation verifying the number of full-time equivalent employees on the Applicant’s payroll as well as the dollar amounts of payroll costs, covered mortgage interest payments, covered rent payments, and covered utilities for the eight-week period following this loan.*
- *I understand that loan forgiveness will be provided for the sum of documented payroll costs, covered mortgage interest payments, covered rent payments, and covered utilities for the eight-week period following this loan.*
- *I understand that loan forgiveness will be provided for the sum of documented payroll costs, covered mortgage interest payments, covered rent payments, and covered utilities, and not more than 25% of the forgiven amount may be for non-payroll costs.*
- *During the period beginning on February 15, 2020 and ending on December 31, 2020, the Applicant has not and will not receive another loan under the Paycheck Protection Program.*

- *I further certify that the information provided in this application and the information provided in all supporting documents and forms is true and accurate in all material respects. I understand that knowingly making a false statement to obtain a guaranteed loan from SBA is punishable under the law, including under 18 USC 1001 and 3571 by imprisonment of not more than five years and/or a fine of up to \$250,000; under 15 USC 645 by imprisonment of not more than two years and/or a fine of not more than \$5,000; and, if submitted to a federally insured institution, under 18 USC 1014 by imprisonment of not more than thirty years and/or a fine of not more than \$1,000,000.*
- *I acknowledge that the lender will confirm the eligible loan amount using required documents submitted. I understand, acknowledge and agree that the Lender can share any tax information that I have provided with SBA's authorized representatives, including authorized representatives of the SBA Office of Inspector General, for the purpose of compliance with SBA Loan Program Requirements and all SBA reviews; and*

WHEREAS, on April 23, 2020 the SBA provided, and has subsequently amended, a document titled “Paycheck Protection Program Loans Frequently Asked Questions (FAQs)” (the “Guidance”) regarding whether “businesses owned by large companies with adequate sources of liquidity to support the business’s ongoing operations qualify for a PPP loan;” and

WHEREAS, the Guidance advises that “all borrowers must assess their economic need for a PPP loan under the standard established by the CARES Act and the PPP regulations at the time of the loan application” and “[a]lthough the CARES Act suspends the ordinary requirement that borrowers must be unable to obtain credit elsewhere (as defined in section 3(h) of the Small Business Act), borrowers still must certify in good faith that their PPP loan request is necessary”; and

WHEREAS, the Guidance advises that applicants pay particular attention to the certification in the PPP loan application regarding “current economic uncertainty” as follows:

- *Specifically, before submitting a PPP application, all borrowers should review carefully the required certification that “[c]urrent economic uncertainty makes this loan request necessary to support the ongoing operations of the Applicant.” Borrowers must make this certification in good faith, taking into account their current business activity and their ability to access other sources of liquidity sufficient to support their ongoing operations in a manner that is not significantly detrimental to the business.*

WHEREAS, the SBA Guidance also states that there is a safe-harbor available if an applicant repays the loan funds before May 7, as follows:

- *Any borrower that applied for a PPP loan prior to the issuance of this guidance and repays the loan in full by May 7, 2020 will be*

deemed by SBA to have made the required certification in good faith; and

WHEREAS, SBA has amended the Guidance to extend this safe harbor period to May 18, as follows:

- *SBA is extending the repayment date for this safe harbor to May 18; and*

WHEREAS, SBA has amended the Guidance to explicitly state:

- *SBA, in consultation with the Department of the Treasury, has determined that the following safe harbor will apply to SBA's review of PPP loans with respect to this issue: Any borrower that, together with its affiliates, received PPP loans with an original principal amount of less than \$2 million will be deemed to have made the required certification concerning the necessity of the loan request in good faith; and*

WHEREAS, YPICS meets the requirement that “[c]urrent economic uncertainty makes this loan request necessary to support the ongoing operations of the Applicant” because it faces substantial financial risk due to COVID-19, including but not limited to:

- Preparation for cash deferrals in state funding. The Fiscal Crisis and Management Assistance Team (“FCMAT”) is projecting that, during the COVID-19 pandemic, the State is likely, starting in June 2020, to implement cash deferrals as it did in the last recession. For YPICS, \$6.3M of its LCFF revenue comes from state aid. The average YPICS monthly state aid payment next year is currently forecasted at \$517K. A three-month deferral of this cash payment would create a \$1.6M cash shortfall.;
- Future state apportionment. FCMAT is projecting likely declines in LCFF state revenue of approximately 5%, possibly up to 10%. At this time, FCMAT believes the best-case scenario would be the 2020-21 COLA to be in the -2% range with a -10% COLA possible. Because 66% of YPICS’s 2019-20 forecasted revenue is from LCFF, a 10% decline in LCFF rates would reduce YPICS’s revenue by \$1M in 2020-21.
- The Charter Schools Development Center is forecasting these cuts may be as high as 20%.
- Additional expense to facilitate distance learning, such as but not limited to additional computers, and the needed purchases of hotspots.
- If the state defers June apportionment, YPICS has no other source of working capital. The amount of the projected deferral of the June apportionment is \$590K, which will impact cash flow, and YPICS’ ability to cover payroll, rent, and utilities.
- Given the increasing likelihood of a severe, multi-year deep recession or depression with uncertain future state funding and enrollment, it is *highly unlikely* that any private lender is going to provide additional loans that are of sufficient size to support ongoing operations.

- YPICS's only option to capital has been, and will continue to be, a receivables sale ("factoring loans"). During the last recession, factoring loans made available to charter schools, but they were at fees that were large enough to be significantly detrimental to their borrowers' businesses. As the recession deepens, and lending risks increase, these very high rates are likely to increase. If such a situation were to occur YPICS would need to keep buying new factored loans on future state revenue as current state revenue is used to pay off previous factored loans, driving YPICS deeper and deeper into the red to pay the fees that apply to each loan. This inevitably has a significantly detrimental effect on the YPICS's educational operations.;
- Unlike school districts, YPICS does not have access to county treasurer Tax Revenue Anticipation Notes, at very low interest rates, or the authorization to propose a parcel tax to increase revenue.
- Unlike district schools which, when they face bankruptcy, are kept open by state and county resources, have access to the ability to apply for TRANS loans (charter schools do not have access to either of these resources), therefore, if YPICS faces insolvency, it goes out of business.

WHEREAS, YPICS has worked tirelessly with its back-office provider over the COVID-19 crisis to conduct a detailed cash flow projection for the next several months and into the 2020-21 school year that validates the assertions made above and specifically the borrowing need given the rapid decline in non-state revenues in 2019-20; and

WHEREAS, YPICS was in operation on February 15, 2020 and had employees for whom it paid salaries and payroll taxes or paid independent contractors, as reported on Form(s) 1099-MISC; and

WHEREAS, the Board of Trustees has determined in good faith that the current economic uncertainty makes the federal Paycheck Protection Program loan necessary to support the ongoing operations of YPICS; and

WHEREAS, the funds will be used to retain workers and maintain payroll or make mortgage interest payments, lease payments, and utility payments as specified under the Paycheck Protection Program Rule; and

WHEREAS, YPICS has already or will provide to Pacific Western Bank documentation verifying the number of full-time equivalent employees on YPICS's payroll as well as the dollar amounts of payroll costs, covered mortgage interest payments, covered rent payments, and covered utilities for the eight-week period following this loan; and

WHEREAS, YPICS understands that loan forgiveness is expected to be provided for the sum of documented payroll costs, covered mortgage interest payments, covered rent payments, and covered utilities, and not more than 25% of the forgiven amount may be for non-payroll costs; and

WHEREAS, YPICS understands that during the period beginning on February 15, 2020 and ending on December 31, 2020, it has not and will not receive another loan under the Paycheck Protection Program; and

WHEREAS, YPICS staff has certified that the information provided in its application and the information provided in all supporting documents and forms is true and accurate in all material respects; and

WHEREAS, YPICS has taken into account its current business activity and its ability to access other sources of liquidity sufficient to support our ongoing operations in a manner that is not significantly detrimental to the business; now, therefore, be it

Resolved by the Board of Trustees of YPI Charter Schools, Inc., That YPI Charter Schools, Inc. meets all requirements of the PPP certifications; and be it further

Resolved by the Board of Trustees of YPI Charter Schools, Inc., That YPI Charter Schools, Inc. has been properly awarded \$1, 527,500.00 in the PPP loan; and be it further

Resolved by the Board of Trustees of YPI Charter Schools, Inc., That YPI Charter Schools, Inc. shall not return the funds awarded through the PPP loan prior to May 14, 2020; and be it further

Resolved by the Board of Trustees of YPI Charter Schools, Inc., That the funds awarded through the PPP loan are hereby authorized to be used in a manner consistent with the terms of the Paycheck Protection Program Rules; and be it further

Resolved by the Board of Trustees of YPI Charter Schools, Inc., That the Executive Director of YPI Charter Schools, Inc. is hereby instructed to further review guidance relating to the PPP as it is released by the SBA and is hereby authorized to take appropriate steps, including the return of the funds, if changes to the Guidelines cause YPI Charter Schools, Inc. to no longer meet the program requirements.

* * *

IN WITNESS WHEREOF, the Board of Trustees has adopted the above resolution by the following vote at a special Board meeting this 26th day of May, 2020.

AYES:

NOS:

ABSTENTIONS:

By: _____
Sandra Mendoza, Secretary
YPI Charter Schools, Inc.

Coversheet

Kaiser Permanente and BenExtend

Section: V. Items Scheduled For Action
Item: B. Kaiser Permanente and BenExtend
Purpose: Vote
Submitted by:
Related Material: 20-21 Health Benefits- Board Presentation.pdf

Rates by Tier		FY 19-20 Current		NOT RECOMMENDED						RECOMMENDED			BenExtend	Additional Benefits					
		FY 19-20 Current -HMO10		Option 1- not recommended by Health benefits team			Option 2- not recommended by Health benefits team			Option 3- Recommended by Health Benefits Team (paired with BenExtend)				BenExtend	Additional Benefits				
		Kaiser HMO High \$10		20-21 Proposal- HMO10			20-21 Proposal- HMO15			20-21 Proposal- HMO20					BenExtend	Additional Benefits			
Ct.				Kaiser HMO High \$10 (9962)	Percent Increase	Kaiser HMO High \$15 (10012)	Percent Increase	Kaiser HMO High \$20 (10053)	Percent Increase		Monthly Premium	Ct.	BenExtend High	BenExtend Mid		BenExtend Low			
Employee Only	55	\$472.73	\$26,000.15	\$488.95	\$26,892.25	3.43%	\$479.70	\$26,383.50	1.47%	\$467.64	\$25,720.20	-1.08%		Ee Only	55	\$21.80	\$17.90	\$11.18	
Employee + Spouse	5	\$1,040.00	\$5,200.00	\$1,075.69	\$5,378.45	3.43%	\$1,055.34	\$5,276.70	1.47%	\$1,028.81	\$5,144.05	-1.08%		Family	36	\$32.57	\$26.67	\$17.52	
Employee + Child(ren)	14	\$945.45	\$13,236.30	\$977.91	\$13,690.74	3.43%	\$959.41	\$13,431.74	1.48%	\$935.29	\$13,094.06	-1.07%		Coverage Level		\$3,000	\$3,000	\$2,000	
Family	17	\$1,418.18	\$24,109.06	\$1,466.86	\$24,936.62	3.43%	\$1,439.11	\$24,464.87	1.48%	\$1,402.93	\$23,849.81	-1.08%		Total Monthly Premium		\$2,371.52	\$1,628.90	\$1,245.62	
Total Monthly Premium					\$70,898.06			\$69,556.81			\$67,808.12			Total Annual Premium		\$28,458.24	\$19,546.80	\$14,947.44	
Monthly Premium Difference			\$68,545.51		\$2,352.55			\$1,011.30			(\$737.39)			Increase from 19-20 HB		3.46%	2.38%	1.82%	
Yearly Difference					\$28,230.60			\$12,135.60			-\$8,848.68								
% Difference					3.43%			1.48%			-1.08%								
Benefits		Kaiser HMO High \$10 (9962)		Kaiser HMO High \$10 (9962)		Kaiser HMO High \$15 (10012)		Kaiser HMO High \$20 (10053)		Summary of Changes		Benefit		Totals					
Annual Deductible		None		None		None		None				Benefit		HMO \$10 plan					
Annual Out of Pocket Max		\$1500 Individual		\$1500 Individual		\$1500 Individual		\$1500 Individual				Benefit		HMO \$15 plan					
		\$3000 Family		\$3000 Family		\$3000 Family		\$3000 Family				Benefit		HMO \$20 plan					
Outpatient Services	Office Visits	\$10	\$10	\$10	\$10	\$15	\$15	\$20	\$20	-\$10.00	\$700+	Current FSA Costs							
	Urgent Care Visit	\$10	\$10	\$10	\$10	\$15	\$15	\$20	\$20	-\$10.00	\$500+	\$250 per EE							
	Eligible Preventive Care	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge			\$20,750.00							
	Lab and X-ray	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	\$10	\$10	-\$10.00	\$1300+	*Paid out \$8400 this year							
	Complex Radiology	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	\$50	\$50	-\$50.00	\$1300+	Savings to utilize: \$12,350							
	Physical Therapy Visit	\$10	\$10	\$10	\$10	\$15	\$15	\$20	\$20	-\$10.00	\$900+								
	Outpatient Services	\$10	\$10	\$10	\$10	\$15	\$15	\$100	\$100	-\$90.00	\$800+								
	Prenatal Services	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge										
	Emergency Room Visit	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		\$300+								
	Ambulance Services	\$50	\$50	\$50	\$50	\$50	\$50	\$100	\$100	-\$50.00	\$700+								
Inpatient Services	Hospital Inpatient	No Charge	No Charge	No Charge	No Charge	\$250	\$250	\$500	\$500	-\$500.00	\$800+								
	Physician Fees	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge		\$1200+								
	Labor & Delivery	No Charge	No Charge	No Charge	No Charge	\$250	\$250	\$500	\$500	-\$500.00	\$200+								
Prescription/ Pharmacy	RX Generic	\$10	\$10	\$10	\$10	\$10	\$10	\$15	\$15	-\$5.00	\$700+								
	RX Brand	\$20	\$20	\$20	\$20	\$30	\$30	\$35	\$35	-\$15.00	\$700+								
	RX Non-Formulary	\$20	\$20	\$20	\$20	\$30	\$30	\$35	\$35	-\$15.00									
	RX Specialty	20%, up to \$200	20%, up to \$200	20%, up to \$200	20%, up to \$200	20%, up to \$200	20%, up to \$200	30%, up to \$200	30%, up to \$200	-10%									

Coversheet

Ad Hoc Nominating Board Members Committee

Section: V. Items Scheduled For Action
Item: C. Ad Hoc Nominating Board Members Committee
Purpose: Vote
Submitted by:
Related Material:
Board Brief Recommendation to Approve AD HOC Board Selection Committee.pdf



YPI CHARTER SCHOOLS

May 21, 2020

TO: YPI Charter Schools
Board of Directors

FROM: Yvette King-Berg
Executive Director

SUBJECT: Recommendation to approve Ad Hoc Board Member Nominating Committee to review expiring board terms and recommend slate of directors for the 2019-2020 school year

BACKGROUND

Terms of office for the following a few board members will expire on June 30, 2020:

ANALYSIS

Each year, the Board has established an Ad Hoc Nominating Committee to identify prospective board members and establish a recommended slate of members for the new school year. The board chair and vice chair are typically part of this committee, along with the Executive Director.

RECOMMENDATION

It is recommended that the Board of Directors appoint Board Chair Mary Keipp as the chair of the Ad Hoc Board Nominating Committee. Additionally, it is recommended the Board appoint Vice-Chair; Cesar Lopez, and Yvette King-Berg, YPICS Executive Director to the Ad Hoc Committee.

It is further recommended that the Board request that the committee convene via conference call prior to June 11th to discuss recommendations to be presented to the Board on June 15, 2020 for formal approval. Board officers for the new school year will be elected at the first meeting of the 2020-2021 school year.

Coversheet

2019-2020 LAUSD Annual Performance-Based Oversight Visit Reports

Section: V. Items Scheduled For Action
Item: D. 2019-2020 LAUSD Annual Performance-Based Oversight Visit Reports
Purpose: Vote

Submitted by:

Related Material:

2. YPIBERT 8054 - Annual Performance-Based Oversight Report 2019-2020.pdf
1. YPICS Recommendation to receive and file LAUSD Annual Performance-Based Oversight Visit Reports for 2019-2020 School Year .pdf
3. YPIOSCAR 8196 - Annual Performance-Based Oversight Report 2019-2020.pdf
4. YPIVALLEY-HS 7598 - Annual Performance-Based Oversight Report 2019-2020 2.pdf



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2019-2020 SCHOOL YEAR

FOR

BERT CORONA CHARTER SCHOOL

Name and Location Code of Charter School

LAUSD Vision

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

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

Charter School Name:		Bert Corona Charter School			Location Code:	8054
Current Address:		City:	ZIP Code:	Phone:	Fax:	
9400 Remick Avenue		Pacoima	91331	818-834-5805		
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2019 to June 30, 2024			6	NE		
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:	
373		500	5-8		5-8	
Total Number of Staff Members:		Certificated:	19	Classified:	58	
Charter School's Leadership Team Members:		Michael Green, Board Member; Yvette King-Berg, Executive Director; Ruben Dueñas, Executive Administrator; Jose D. Castillo, Director of Operations; Daniel Rios, Director of Instruction;			Diana Gamez, Senior Director of Programs Yesenia Zubia, HR/AP Coordinator Lilia Limón, SFAF Tania Beltran, SFA Facilitator	
Charter School's Contact for Special Education:		Vashon Nutt, Director of Special Education				
CSD Assigned Administrator:	Dr. Alves-Monaster		CSD Fiscal Services Manager:	Remedios Dizon		
Other School/CSD Team Members:		Taylor Wichmanowski, Specialist				
Oversight Visit Date(s):		December 13, 2019		Fiscal Review Date (if different):	N/A	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):		N/A		LAUSD Co-Location Campus(es) (if applicable):	N/A	
				DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:	N/A	

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLEAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 12/13/2019

CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

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

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



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GOVERNANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>(G2) The Governing Board complies with most material provisions of the Brown Act. Per evidence in Binder 1:</p> <ul style="list-style-type: none"> • The YPICS Board meets on a regular basis (8/19/2019, 9/16/2019, 10/21/2019, 11/6/2019, and 1/18/2019). • Agendas and minutes are posted and included as a link on Board-On Track. • Board takes and reports votes in open meeting by creating a motion to approve and calling Roll Call of Board members that are present at the meeting. <p>(G5) The Governing Board monitors school performance and other internal data to inform decision-making. Review of documents provided in Binder 1 revealed the following: The Youth Policy Institute Charter Schools (YPICS) discussed on Monday, June 17, 2019 via the Executive Director’s Report data collection in preparation for the 2019-2020 school year. As a result of reviewing data which was formative, summative and surveys the Board and the Leadership Team developed focus areas that include:</p> <ul style="list-style-type: none"> • Consistent Classroom Management Strategies in all classrooms to create emotionally safe spaces for ALL students (Relay GSE Instructional Leadership) • Support rigorous, thinking-rich classes (Relay GSE Instructional Leadership) • Weekly observation and feedback to teachers (Relay GSE Instructional Leadership) • Data focus: iReady • Joy • Decrease Chronic absenteeism to below 5% • Decrease suspension and expulsion below 3% • Increase student academic achievement in ELA and math by 5% <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>(G1) 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). Please note the following:</p> <ul style="list-style-type: none"> • As noted in 2018-2019 the organizational structure has leadership roles that overlap between the Chief Operations Officer and the Executive Administrator. Per the charter the organization has not been able to completely fulfill the terms of the petition. The YPICS leadership noted they are aware of this concern, however at this time the organization indicated they are not able to fulfill this part of the approved charter. • School Site Council/ELAC agendas and minutes- the school has had one meeting during the 2018-2019 school year and the School Advisory Council and ELAC meet together as evidenced by agendas and minutes, please see request pertaining to this item in the notes section. • On October 21, 2019 the Youth Policy Institute Charter Schools (YPICS) agendized a change in governance structure with a recommendation to approve updating board By-laws and Articles of Incorporation to remove YPI as the sole-statutory member of the YPI Charter Schools, Inc. CSD requests the 	



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organization forwards such changes of the documents and approved agendas and minutes once all has been completed to finalize requested Material Revision.

(G2) CSD staff discussed with school leaders the need to ensure that the Board Meeting dates posted are aligned to actual Board meeting dates including required documentation; for example:

- October 28, 2019 Board Meeting Dates (UPDATED 9/11/19) versus the Board On Track –regular Meeting agenda dated October 21, 2019.
- August 19, 2019 on Board Meeting Dates for 2019-2020 with no evidence of agendas or minutes for such meeting on Board On Track

The YPICS leader noted that this will be referred back to the board.

(G3) 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, as evidenced by Binder 1:

- Review of the included Handbook revealed that it did not include for the school’s process for stakeholder complaints. Review of the Stakeholder Complaint Procedure revealed the following:
 1. The process for General Complaint procedures and the evidence of a flow chart presented in 1.12 does not match.
 2. Under school provides a meaningful opportunity to be heard: the complaint procedures provides a one-step complaint process that goes from resolving complaint informally to file a written complaint with the office to the Executive Director or Chair of the Board.
 3. Under school provides reasonable opportunity for fair appeal: it did not provide guidance to the stakeholder as to where, how, timeliness (only that the complainant may file a written complaint with the office of the Executive Director or Chair of The Board).
 4. Under school provides sufficiently clear advance notice of specific issue/proposed action: the school did not provide guidance to the stakeholder.
 5. The Stakeholder Complaint Procedure was not provided in other languages
 6. Steps informing stakeholders of follow up were not included.
- In order to address the items noted above, the YPICS leadership has shared that they will share the information with their board and will update the information.

Corrective Action Required

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

Notes:

(G1) The CSD requests the school provides evidence of ELAC delegating their duties to SAC, please provide a response no later than

(G5) The Board provided evidence of review and analysis of data to support sound decision-making. However, moving forward CSD noted a need for the Board to receive updates of systemic reviews of school performance data and other information in a format that addresses each charter school individually to be able to track growth and report consistently and independently of each other.

****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.***



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

The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:

- Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations
- Evaluation of school’s executive level leadership

	Rubric	Sources of Evidence
Performance	<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 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 checked="" 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"/> Organizational 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 checked="" type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <input 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)



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G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

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:

- 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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input checked="" 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 (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 process
- 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 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 checked="" 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) <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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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) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> ESSA Grid <input type="checkbox"/> Other: (Specify)



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

<i>The Governing Board has a system in place to ensure ongoing:</i>		
<ul style="list-style-type: none"> 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 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 other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a 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)

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 (e.g., inadequate cash flow, etc.) and/or 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 (e.g., inadequate cash flow, etc.) and/or 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 checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a 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 checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)



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

<p><i>The Governing Board has a system in place to ensure sound fiscal management and accountability:</i></p> <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> <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.)
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a 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)

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



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STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	2
<p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>If yes, what is the school's identification? (See additional information within "Notes" section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>(A5) The school reclassifies English Learners at 21.7%, which is at a rate higher than the Resident Schools Median of 24.8%.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>(A1) Some of the school's subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019, as follows:</p> <ul style="list-style-type: none"> • 0.00% of English Learner students Met or Exceeded the Standards, a 3.49 percentage point decrease. • 16.71% of Latino students Met or Exceeded the Standards, a 6.47 percentage point decrease. • 16.40% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, a 7.53 percentage point decrease. • 2.60% of Students with Disabilities Met or Exceeded the Standards, a 4.42 percentage point increase. <p>(A2) None of the school's subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019, as follows:</p> <ul style="list-style-type: none"> • 0.00% of English Learner students Met or Exceeded the Standards, with no growth. • 10% of Latino students Met or Exceeded the Standards, a 2.27 percentage point decrease. • 10.94% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, a 3.03 percentage point decrease. • 2.56% of Students with Disabilities Met or Exceeded the Standards, a 2.85 percentage point decrease. <p>(A3) The schoolwide percentage of students who Met and Exceeded Standards in 5th – 8th Grade on the SBAC in ELA is 16.49%, which is substantially lower than the Resident Schools Median of 37.01%. The school leadership noted the decline in ELA to teachers using their own curriculum and lack of adaptive computer based programs and the loss of an English teacher (see summary below in A4).</p> <p>(A4) The schoolwide percentage of students who Met or Exceeded Standards in 5th – 8th Grade on the SBAC in Math is 11.44%, which is at a rate lower than the Resident Schools Median of 23.42%. The school leadership noted the decline to the use of Power Teaching, which had no flexibility nor was it adaptive to supplement ALEKS.</p> <ul style="list-style-type: none"> • For ELA and Math the school is providing various interventions driven from the i-Ready result data – the school's new tool that provides diagnostic assessments with targeted data to support student academic achievement. Such interventions include: general education class support (tutors), after school tutoring, and Saturday Academy. In addition several teachers have begun to implement a blended learning approach to support targeted and small group teaching for students. 	



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

(A6) The school's percentage of "At Risk" English Learners is 5.9%, which is at a rate higher than the Resident Schools Median of 1.2%. Analysis of the 2018-20196 ELPAC results noted that students at Bert Corona Middle performed best in the Oral domain, with the written domain in Reading at 58%. The school leadership noted that they have developed the following: (1) placed students in their reading intervention classes (SFA) to focus on reading mastery levels; (2) EL Snapshots have been created to provide guidance to teachers and needs of ELD students with IEP's; and (3) Created Individualized learning plans for general education EL learners.

(A7) The school's percentage of LTELs is 25.5%, which is at a rate higher than the Resident Schools Median of 20.7%. (See notes in A6).

Corrective Action Required

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

Notes:

YPICS's reclassification criteria are as follows:

- Comparison of performance in basic skills – earning C or better in their grade level English class.
- Assessment of English Proficiency – ELPAC Results, NWEA Maps (*iReady*)
- Teacher evaluation of student academic performance
- Parent opinion and consultation

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



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

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

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

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

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

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

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

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



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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 similar 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 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 substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <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 and 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 similar 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) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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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 2018-2019 (CDE) 		
Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input type="checkbox"/> Reclassification Criteria for all applicable grade levels (within "Notes" section above) (B2.4) <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 2018-2019 (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school's percentage of "At Risk" English Learners is at rate lower than the Resident Schools Median <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate similar to the Resident Schools Median <input checked="" type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> "At-Risk" by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1)



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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 2018-2019 (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school's percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate similar to the Resident Schools Median <input checked="" type="checkbox"/> The school's percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1)

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> • Four-Year Adjusted Cohort Graduation Rate (CDE) (high schools only) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE) <input type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Graduation Requirements (within "Notes" section above) (B2.5) <input type="checkbox"/> Other: (Specify) <hr/> A-G passing grade requirement (e.g. C or D) (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



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

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

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

Rubric		Sources of Evidence
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, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input checked="" type="checkbox"/> No assessment of performance for this indicator.	<input type="checkbox"/> Internal academic performance and progress data and information (B2.2) <input type="checkbox"/> School Internal Assessment Data Report or equivalent (B2.6) <input type="checkbox"/> Other: (Specify)



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CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS

Summary of School Performance

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

I. Academic Performance

A10: CAASPP ENGLISH LANGUAGE ARTS - Grades 3-5 Grades 6-8 Grade 11 – Bert Corona Middle School (grades 5-8)

Performance Level Color: Red

Change Level: Declined

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

Performance Level Color: Red

Change Level: Declined

A12: ENGLISH LEARNER PROGRESS

Performance Level Color: Not Applicable

Change Level: Not Applicable

A13: COLLEGE/CAREER (high schools only)

Performance Level Color: Not Applicable

Change Level: Not Applicable

II. Academic Engagement

A14: CHRONIC ABSENTEEISM

Performance Level Color: Yellow

Change Level: Maintained

A15: GRADUATION RATE

Performance Level Color: Not Applicable

Change Level: Not Applicable

III. Conditions and Climate

A16: SUSPENSION RATE

Performance Level Color: Green

Change Level: Declined

NOTES:



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Progress on LAUSD Board of Education and/or MOU Benchmarks related to STUDENT ACHIEVEMENT (if applicable):
2019-2020 ACADEMIC BENCHMARKS – update for 2019-2020

- BENCHMARK 1: **MET** - English Learners to meet or exceed the Resident Schools' Median and the District Reclassification
- BENCHMARK 2: **NOT MET** – In ELA, the California Dashboard reports that EL students declined by 14.8 points and were 107.6 points below standard and Students with Disability maintained at 2.8 points and were 137.2 points below standard. The school did not make progress to demonstrate performance level growth per the academic year.
- BENCHMARK 3: **NOT MET** – In Math, the California Dashboard reports that EL students declined by 11.4 points and were 138.8 points below standard and Students with Disability declined by 3.6 points and were 176.7 points below standard. The school did not make progress to demonstrate performance level growth per the academic year.

The school noted: for ELA and Math the school is providing various interventions driven from the *i*-Ready results. Such interventions include: general education class support (tutors), after school tutoring, and Saturday Academy. In addition several teachers have begun to implement a blended learning approach to support targeted and small group teaching for students.



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ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	1
<p>++Due to a fatal flaw the school received a rating of (1), note that the school would otherwise earned a rating of (3).</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p>(O1) 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 has had 3 drills, fire drill, great shakeout, and earthquake drill. Although the school leadership noted drills/real scenarios have happened addressing student and teacher preparation for emergencies outside of fire and earthquake drills, the CSD noted during the debrief a need to have an assurance that such emergencies provided opportunities for learning, practice and debriefs after the fact.</p>	
<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. The school leadership noted that the Special Education department is also part of the observation and coaching in the classrooms which is part of the new process the school is embracing for the 2018-2019 school year.</p>	
<p>(O7) 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. Review of Binder 3 provided the following evidence:</p> <ul style="list-style-type: none"> • Youth Truth survey to assess overall experience of students on campus • Agenda of a School Culture and Climate committee meeting (11/18/19) where they discussed SMART goals, classroom supports and expectations • Evidence provided of staff feedback survey at the end of the meeting • PBIS Tier 1 planning for 2019-2020 • Schoolwide expectations and outcomes training • Bullying awareness training 10/17/19 • Classroom management 101 training • Matrix of foundation for classroom interventions and supports 	
<p>(O9) The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns. As evident in Binder 3 and website of: Illuminate training for parents and evidence of progress report provided to parents. The school sent a letter to parents 10/11/19 to inform them of a new communication system called “Remind” to get up to date information about workshops and events at the school via a download app. The school also included evidence via a letter to parents for notification of truancy, excessive absences and tardies. The school provided evidence of School Site Advisory Council with two dates noted October 30, and November 20, 2019, such meeting included discussion from the leadership team with stakeholders of results of the Executive Summary of Family Service.</p>	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p>	



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- (O3) The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS. The school leadership adopted a math curriculum called Ready Math that is Common Core aligned, provides curricular materials and diagnostics. The school is in the process of adopting a similar curriculum for ELA, Science, and Social Science with an emphasis on ELA for the coming year.
- (O4) 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. As noted in A1 through A4, the school leadership has shifted to the i-Ready diagnostic assessment to identify a baseline of performance and areas of need. The school provided evidence of their internal data analysis system which identified:
- English Learners, Specials Education and School Wide, CSD noted a need to include subgroup data analysis for Latino and Socioeconomically Disadvantaged Students.
 - Math data comparison provided from their first i-Ready diagnostic results did include a shift of students from Tier III (2 or More Grade Levels Below) to Tier II (1 Grade Level Below) and Tier I (On/Above Grade Level) across all grade levels and subgroups.
- (O5) The school has partially implemented the key features of the educational program described in the charter. The school continues to provide a small learning environment for personalization and support. BCCS utilizes Standards Mastery Based Grading in all general education classes. The organization continues to work to perfect such practices, however the CSD continues to note the need to retain teachers at Bert Corona Middle School to continue to internalize their practice. In addition, the school continues to provide opportunities for students to engage in PBL, although the school noted that this year there is a dire urgency to focus on Get Better Faster teaching and coaching strategies to support the development of their teachers, the school is continuing to provide opportunities through the lens of service learning, using the CASA curriculum in ELA and Social Studies. Finally BCCS continues to implement literacy instruction every day for students through SFA, whereas all teachers are required to teach the curriculum with the expectation that such practices will transition into their subject area curriculum. The leadership team noted that they are continuing to coach and support such practice
- (O6) 300 Report –
- 8 in Tier 3- some of the minutes might be due to staff absence and/or not inputting the information and 1 tier 5 – counseling – still owe two hours (counselor or student absence), the school leadership noted they are working on scheduling the extra hours to ensure required minutes are rendered.
 - 200 Report - One overdue, primarily as student came in with open assessment, the school leadership noted they are working with the prior school to partner in completing the IEP.
- (O8) The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligned with the education program set forth in the charter. The school leadership noted implementation of practices are in the beginning stages as the school is making a shift to new curriculum, new classroom strategies and newly defined coaching practices to support their teachers. The school leadership noted the following:
- Ready Math curriculum associates have offered three professional development sessions for all math teacher throughout the year- with a focus on utilization of curriculum and intervention practices.



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- A focus on strong classroom management and rigorous instruction through classroom observations and feedback cycles that deliver high quality instruction. YPICS has adopted Relay's Get Better Faster coaching model and is continuing to provide training to ensure strong management and rigor.
- Evidence of several PD topics such as: backward design, validating of power standards, calibration scoring of SFA cycle tests, effectively using grouping.

(O11) 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. The school leadership noted:

- They are in the beginning stages of developing a coaching cycle to support the needs of their staff. The school administration (two staff members) have attended the Relay Graduate School of Education that provide a scope and sequence platform for teacher growth based on their current level of performance.
- Coaching is split between 4 members of the instructional leadership team. The focus the first 3 months is on the management trajectory and data meetings with teachers who are ready to move on to a particular element of coaching.

(O12) 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 as evidenced by:

- 3 employees are due to complete mandated employee training by the end of the month. The CSD notes that the school must send a status update prior to December 20 2019.
- One employee had mandated employee reported more than six weeks after the employment date. Started 9/23/19 and completed training 11/15/19 (which is 11 days after the deadline). Fatal flaw: *A charter school shall receive a rating of 1 in this category for any of the following reasons* (2) Failed to conduct child abuse mandated training in accordance with AB 1432. This mandatory annual training must be completed within the first six weeks of each school year or within the first six weeks of a person's employment.

Corrective Action Required

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

Notes:

None

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



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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
Performance	<p><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</p> <p><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</p> <p><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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10)</p> <p><input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b)</p> <p><input checked="" type="checkbox"/> Evacuation route maps (B3.1b)</p> <p><input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c)</p> <p><input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b)</p> <p><input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f)</p> <p><input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4)</p> <p><input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4)</p> <p><input checked="" type="checkbox"/> Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020 (“ESSA Grid”) (B3A.1)</p> <p><input checked="" type="checkbox"/> Site/classroom observation</p> <p><input checked="" type="checkbox"/> Visitor’s Policy (B3.1a)</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
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 (B3.2a) <input checked="" type="checkbox"/> Evidence of student immunization (B3.2b) <input checked="" type="checkbox"/> Evidence of health screening (B3.2b) <input checked="" type="checkbox"/> Evidence of Epi-pen (B3.2c) <input type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <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

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), and the California Next Generation Science Standards (CA NGSS) that are applicable to the grade levels served
- 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 & CA NGSS <input type="checkbox"/> The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input checked="" type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program <input checked="" type="checkbox"/> Evidence of implementation of CA NGSS (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3.3c) <i>*new schools only</i> <input type="checkbox"/> WASC documentation (B3.3d) <input type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3.3i) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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

<i>The school:</i>	
<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 standards-based instruction, progress monitoring, assessment, and reclassification) • Has appointed a designee to assist and support foster youth 	
Performance	Rubric
Performance	Sources of Evidence
	<ul style="list-style-type: none"> <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
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.3j) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3.3j) <input checked="" type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



LAUSD CHARTER SCHOOLS DIVISION

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Annual Performance-Based Oversight Visit Report

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

O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6

<i>The school has a system in place to ensure that the school:</i>	
<ul style="list-style-type: none"> • 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
<p>Performance</p> <p><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</p> <p><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</p> <p><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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10)</p> <p><input checked="" type="checkbox"/> Professional development documentation (B3.4b)</p> <p><input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j)</p> <p><input checked="" type="checkbox"/> Self-Review Checklist (B3.4a)</p> <p><input checked="" type="checkbox"/> Other special education documentation (B3.4a)</p> <p><input checked="" type="checkbox"/> Consultation with Charter Operated Programs office</p> <p><input checked="" type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education (B3.4a)</p> <p><input checked="" type="checkbox"/> Classroom observation</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3.4c) <input checked="" type="checkbox"/> Evidence of data monitoring (B3.4c) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, and disproportionality (B2.1) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates <input checked="" type="checkbox"/> Evidence of implementation of AB 2291 (B3.4c) <input checked="" type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



LAUSD CHARTER SCHOOLS DIVISION

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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

The school:			
<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	<table border="1"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <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 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 checked="" 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 </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table>	<ul style="list-style-type: none"> <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 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
<ul style="list-style-type: none"> <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 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" 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

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

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

Rubric		Sources of Evidence
Performance	<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 type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <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 (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) grades 6-12 (B3.4d) <input checked="" 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
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year

**required on website

	Rubric	Sources of Evidence
Performance	<p><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</p> <p><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</p> <p><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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for:</p> <ul style="list-style-type: none"> • UCP Procedure and Forms • Complaint Forms • SB 1375 Information • AB 2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics • Student Achievement Information <p><input checked="" type="checkbox"/> Evidence of implementation of AB 2022 (B3.4e)</p> <p><input type="checkbox"/> Other: (Specify)</p>



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

<p><i>The school has a system in place for the evaluation of school staff designed to ensure that:</i></p> <ul style="list-style-type: none"> • the school’s educational program yields high student achievement • the school complies with all applicable legal requirements 		
Performance	Rubric	Sources of Evidence
Performance	<p><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</p> <p><input 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</p> <p><input checked="" 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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Documentation related to a system for evaluation of staff and administrator(s) (B3.4f)</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



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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 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 checked="" type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: **Bert Corona Charter - MIDDLE**

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DATE OF VISIT: **12/13/2019**

Location Code: **8054**
 School Name: **Bert Corona Charter**
 FY Start Date: **2003-04**

Charter #: **654**
 CDS Code: **1964733 0106872**

8054	2016-17					2017-18					2018-19				
	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
Bert Corona Charter															
Cash and Cash Equivalents		1,735,434	1,927,259	1,689,773	1,689,773		2,053,884	2,056,441	1,291,457	1,291,458		0	1,676,586	1,417,587	0
Current Assets		2,340,594	2,544,661	2,620,233	2,928,158		2,847,169	2,650,902	2,768,906	2,813,603		0	2,762,249	2,925,550	0
Fixed and Other Assets		805,518	739,262	633,065	633,548		672,285	687,077	664,037	666,773		0	533,298	798,368	0
Total Assets		3,146,112	3,283,923	3,253,299	3,561,706		3,519,453	3,337,979	3,432,943	3,480,376		0	3,295,547	3,723,918	0
Defered Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		241,972	248,555	365,435	653,707		418,850	319,899	419,742	456,218		0	162,826	588,825	0
Long Term Liabilities		16,159	16,159	18,009	0		97,014	18,009	26,013	37,052		0	26,134	0	0
Total Liabilities		258,131	264,714	383,444	653,707		515,864	337,908	445,755	493,270		0	188,960	588,825	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		2,887,981	3,019,210	2,869,855	2,907,999		3,003,590	3,000,071	2,987,188	2,987,106		2,981,483	3,106,587	3,135,093	0
Total Revenues	7,184,731	7,880,732	8,021,427	8,599,586	8,908,012	7,513,848	7,739,936	7,853,792	8,533,552	8,586,103	8,138,527	8,230,745	8,197,419	8,104,418	0
Total Expenditures	6,992,654	7,724,322	7,733,789	8,461,302	8,731,584	7,490,434	7,644,364	7,761,720	8,454,363	8,501,898	7,990,737	8,157,261	8,077,938	7,956,432	0
Net Income / (Loss)	192,077	156,411	287,639	138,284	176,428	23,414	95,572	92,072	79,189	84,205	147,790	73,484	119,481	147,987	0
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	192,077	156,411	287,639	138,284	176,428	23,414	95,572	92,072	79,189	84,205	147,790	73,484	119,481	147,987	0
Net Assets, Beginning	2,682,931	2,731,571	2,731,571	2,731,571	2,731,571	3,019,210	2,908,018	2,908,018	2,907,999	2,907,999	2,982,365	2,907,999	2,987,187	2,987,187	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	(19)	0	(5,098)	0	0	(81)	(81)	0
Net Assets, Beginning, Adjusted	2,682,931	2,731,571	2,731,571	2,731,571	2,731,571	3,019,210	2,908,018	2,907,999	2,907,999	2,902,901	2,982,365	2,907,999	2,987,106	2,987,106	0
Net Assets, End	2,875,008	2,887,981	3,019,210	2,869,855	2,907,999	3,042,624	3,003,590	3,000,071	2,987,188	2,987,106	3,130,155	2,981,483	3,106,587	3,135,093	0

8054	Audited Financials					2019-20				
Bert Corona Charter	2015-16	2016-17	2017-18	2018-19	2019-20	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	1,366,955	1,689,773	1,291,458	0	0		0	0	0	0
Current Assets	2,229,114	2,928,158	2,813,603	0	0		0	0	0	0
Fixed and Other Assets	734,336	633,548	666,773	0	0		0	0	0	0
Total Assets	2,963,450	3,561,706	3,480,376	0	0		0	0	0	0
Defered Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	231,879	653,707	456,218	0	0		0	0	0	0
Other Long Term Liabilities	0	0	37,052	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	231,879	653,707	493,270	0	0		0	0	0	0
Net Assets	2,731,571	2,907,999	2,987,106	0	0		0	0	0	0
Total Revenues	7,818,510	8,908,012	8,586,103	0	0	7,585,402	0	0	0	0
Total Expenditures	7,235,314	8,731,584	8,501,898	0	0	7,581,083	0	0	0	0
Net Income / (Loss)	583,196	176,428	84,205	0	0	4,319	0	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	583,196	176,428	84,205	0	0	4,319	0	0	0	0
Net Assets, Beginning	2,148,375	2,731,571	2,907,999	0	0	3,106,587	0	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	(5,098)	0	0	(38,341)	0	0	0	0
Net Assets, Beginning, Adjusted	2,148,375	2,731,571	2,902,901	0	0	3,068,246	0	0	0	0
Net Assets, End	2,731,571	2,907,999	2,987,106	0	0	3,072,565	0	0	0	0



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: **12/13/2019**

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> <p>Bert Corona Charter’s fiscal condition is positive and has been upward trending since the 2015-2016 fiscal year. According to the 2017-2018 independent audit report, the school had positive net assets of \$2,987,106 and net income of \$79,107. The 2018-2019 Unaudited Actuals project positive net assets of \$3,135,093 and net income of \$147,987.</p> <p>According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2018, Bert Corona Charter is one of three schools operated by YPICS, all of which are currently authorized by the Los Angeles Unified School District (LAUSD). YPICS’s fiscal condition is strong. YPICS and its charter schools reported positive net assets of \$20,684,230 and net income of \$12,857,680. YPICS, without its charter schools, reported positive net assets of \$365 and net income of \$365. According to YPICS, there are no management fees charged to Bert Corona Charter or the other charter schools that it operates. Instead, each school pays a portion of the actual expenses for shared costs and administrative services that are related to the organization as a whole. These costs are allocated between the schools based on Average Daily Attendance (ADA) for each school.</p> <p>Areas of Demonstrated Strength and/or Progress:</p> <p>1. The school’s fiscal condition is positive.</p>		3																													
	<table border="1"> <thead> <tr> <th></th> <th>2015-2016 (Audited Actuals)</th> <th>2016-2017 (Audited Actuals)</th> <th>2017-2018 (Audited Actuals)</th> <th>2018-2019 (Unaudited Actuals)</th> <th>2019-2020 (Preliminary Budget)</th> </tr> </thead> <tbody> <tr> <td>Net Assets</td> <td>\$2,731,571</td> <td>\$2,907,999</td> <td>\$2,987,106</td> <td>\$3,135,093</td> <td>\$3,139,412</td> </tr> <tr> <td>Net Income/Loss</td> <td>\$583,196</td> <td>\$176,428</td> <td>\$79,107</td> <td>\$147,987</td> <td>\$4,319</td> </tr> <tr> <td>Transfers In/Out</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>Prior Year Adjustment(s)</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> </tr> </tbody> </table>		2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Unaudited Actuals)	2019-2020 (Preliminary Budget)	Net Assets	\$2,731,571	\$2,907,999	\$2,987,106	\$3,135,093	\$3,139,412	Net Income/Loss	\$583,196	\$176,428	\$79,107	\$147,987	\$4,319	Transfers In/Out	\$0	\$0	\$0	\$0	\$0	Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Unaudited Actuals)	2019-2020 (Preliminary Budget)																										
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LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLEAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 12/13/2019**Areas Noted for Further Growth and/or Improvement:**

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

1. Untimely Bank Deposits:

Based on the CSD's review of the school's bank statements for the period from April 2019 through September 2019, a sample of 15 deposit transactions were randomly selected for further review. The CSD noted two bank deposits that were made late (based on the requirements outlined in the school's fiscal policies and procedures). Details regarding these deposits are provided below.

Item #	Account #Ending in	Date Funds Collected	Date Funds Deposited	Number of Days Late	Deposit Amount
1	X0661	6/7/2019	6/24/2019	2	\$2,060.00
2	X0661	6/24/2019	7/8/2019	1	\$3,411.00
TOTAL					\$5,471.00

Page 7 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "Deposits will be made within ten business days."

According to the school, its leadership team will discuss this policy with its staff to ensure that all funds collected are deposited in a timely manner. Further, the school stated that, that, in January 2020, training on the school's fiscal policies and procedures will be provided to all staff, and weekly reminders will be sent to all designated depositors to ensure that all funds collected in the future are deposited timely.

The CSD recommends that the school's Chief Operations Officer, its Executive Administrator/Assistant Executive Administrator (or the authorized designee), who bears the responsibility of reviewing and approving deposits, ensure that all funds collected are deposited timely, and appropriate controls are established, to prevent the school's funds from being deposited late in the future.

2. Lack of Documented Approvals of Bank Reconciliation Reports:

Based on the CSD's review of a sample of the school's Bank Reconciliation Reports for the period from April 2019 through September 2019, the CSD noted that the August 2019 Bank Reconciliation Report for the Checking Account Ending in X7817 lacked evidence of approval.



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Page 2 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Accounting Manager or Vice President, School Finance assigned to the organization will review and approve the bank reconciliation by initialing and dating the report.”

According to the school’s back office services provider firm, all of the school’s Bank Reconciliation Reports are prepared and approved electronically, and its financial software does not permit the completion of the next bank reconciliation cycle until the current Bank Reconciliation Report has been approved.

The CSD recommends that the school consistently prepare and approve all Bank Reconciliation Reports in the manner outlined in its fiscal policies and procedures, and ensure that all future Bank Reconciliation Reports are prepared accurately, reviewed and approved in a timely manner, and include the appropriate signatures (including the printed names and titles/positions), as well as the preparation and review/approval dates, to validate the review and approval processes performed by the school.

3. Checks Outstanding for 90 Days or More:

Based on the CSD’s review of the school’s Bank Reconciliation Reports, the CSD noted an employee reimbursement check that, as of September 30, 2019, had been outstanding for more than 90 days (Check # 307101, in the amount of \$32.82, dated 6/7/2019).

The school stated that the check referenced above was researched and investigated before it was voided and reissued.

The CSD recommends that the school update its fiscal policies and procedures, to provide guidance and establish expectations for its staff regarding the research, investigation, write-off, and reissuance of checks that have been outstanding for specified periods of time.

4. Lack of Documented Pre-Approval for Travel Expenses:

Based on the CSD’s review of the school’s credit card statements and 40 sample transactions for the period spanning from April 2019 through September 2019, the CSD noted two travel-related charges that lacked evidence of pre-approval from the school’s Executive Director. Details regarding these transactions are provided below.

Item #	Acct # Ending in	Transaction Date	Vendor Name	Amount	Transaction Description
1	X0194	4/9/2019	Airbnb	\$471.92	Room accommodations for State speech and debate competition
2	X0194	4/16/2019	Airbnb	\$214.83	Lodging for college trip to UC Merced and SFSU
TOTAL				\$686.75	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Executive Director must pre-approve all school related travel.”



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According to the school, all school-related travel plans are discussed and approved during the school’s leadership team check-in meetings.

The CSD recommends that the school’s governing board require the school’s leadership team to establish more stringent controls in this area and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.

5. Lack of Documented Pre-Approvals for Employee Reimbursements:

Based on the CSD’s review of the school’s check register for the period from November 2018 through October 2019, a sample of 55 transactions were selected for further review. The CSD noted three employee reimbursements that lacked evidence of pre-approval from either the school’s Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. The reimbursements in question are summarized below.

Item #	Reimbursement Check Issuance Date	Check #	Payee	Reimbursement Check Amount	Transaction Description
1	11/16/2018	306352	School Employee	\$82.01	Parent conference breakfast
2	12/6/2018	306422	School Employee	\$91.93	Food for MORCS DVR
3	5/10/2019	307002	School Employee	\$74.00	ORO Tel Inc. – Live Scan
TOTAL				\$247.94	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “An employee or school volunteer seeking to make a school-related purchase must obtain pre-approval from the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator.”

During the CSD’s fiscal review of the school in the previous year (2018-2019), the CSD noted six employee reimbursements that lacked evidence of pre-approvals from the school’s Executive Director, its Chief Operations Officer, or its the Executive Administrator and, in response, the school advised the CSD that the school’s leadership team would develop a Pre-Approval Form to ensure that all future pre-approvals of employee reimbursements were documented.

However, during the current year’s fiscal review (2019-2020), the school informed the CSD that the Pre-Approval Form referenced by the school in 2018-2019 was not actually implemented in 2019-2020 (because the school considers the Form cumbersome). The school further advised the CSD during the 2019-2020 fiscal review that, instead of implementing this Pre-Approval Form, the school intends to revise its fiscal policies and procedures and will propose an acceptable method of employee reimbursement pre-approval to its governing board for consideration (which, according to the school, could include some form of email approval or other documentation).



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The CSD recommends that the school’s governing board require the school’s leadership team to establish more stringent controls in this area, and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.

6. Lack of Documented Approval for Purchase Requisitions/Purchase Orders:

Based on the CSD’s review and analysis of supporting documents provided by the school, the CSD noted a vendor payment that was not supported by a purchase order reflecting documented approval from either the school’s Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. Details regarding the vendor payment in question are provided below.

Check #	Check Issuance Date	Vendor	Description	Amount	CSD’s Comments
307440	8/29/2019	Lakeshore Learning Materials	Classroom supplies - BCCS	\$282.26	Purchase order not signed/approved
			Classroom supplies - BCCHS	\$801.19	
			Classroom supplies - MORCS	\$908.86	
TOTAL				\$1,992.31	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “All purchases over \$500 require a purchase requisition. The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator will approve the purchase requisition after determining:

- If the expenditure is budgeted.
- If funds are available for the expenditure.
- If the expenditure is allowable under the appropriate revenue source.
- If the expenditure is appropriate and consistent with the vision, approved charter, school policies and procedures and any related laws or applicable regulations.
- If the price is competitive and prudent and proper bidding procedures have been followed.”

According to the school, its leadership team will review all of the school’s purchase orders and purchase requisitions and ensure that the appropriate approvals are documented therein.



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The CSD recommends that the school strictly adhere to its governing board-approved fiscal policies and procedures to ensure that complete supporting documents are submitted and appropriate approvals are obtained for all applicable transactions, including purchase orders.

7. Bank Service Fees and Charges on Student Body and Parent Accounts:

Based on the CSD's review of the school's bank statements, the CSD noted the following bank fees and charges:

Item #	Acct # Ending in	Statement Closing Date	Transaction Amount	Transaction Description
1	X7817	4/30/2019	\$12.00	Monthly Service Fee
2	X7817	5/31/2019	\$12.00	Monthly Service Fee
3	X0299	7/31/2019	\$24.80	Analysis Service Charge: Returned Deposited Items (\$14.00) and Branch Coin/Currency Services (\$10.80)
4	X0552	7/31/2019	\$0.30	Analysis Service Charge: Branch Coin/Currency Services
5	X0661	7/31/2019	\$22.01	Cash Deposit Immediate: Excess Cash Deposits
6	X0299	8/31/2019	\$29.70	Analysis Service Charge: Branch Coin/Currency Services
7	X0299	9/30/2019	\$12.90	Analysis Service Charge: Branch Coin/Currency Services
TOTAL			\$113.71	

The CSD was informed that the school's leadership team is considering changing financial institutions for its Student Body and Parent bank accounts.

The CSD recommends that the school regularly review all of its bank statements, note all assessed service fees or charges, and consider alternatives for eliminating or reducing such charges.

8. Penalties Incurred for Late Retirement Contribution Payments to California State Teachers' Retirement System (CalSTRS):

Based on the CSD's review of the school's check register, a CalSTRS contribution payment was selected for further review. The CSD noted that the supporting documents provided for this payment, which was made on or about 1/31/2019 (in the amount of \$93,221.95, payable to the Los Angeles County Office of Education—in reference to the school's November 2018 contribution), included a delinquency penalty of \$34.18.

According to the Los Angeles County Office of Education, delinquency penalties are assessed when mandatory CalSTRS contribution payments are made later than the specified payment periods (pursuant to the California Education Code).

According to the school, its CalSTRS contribution payments are challenging for it to manage, due to unforeseen factors that may require subsequent changes to its calculations (such as part-time employee hours, staff changes, policy changes, etc.).



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The CSD recommends that the school’s Executive Director, who bears the responsibility for all operations and activities related to financial management, ensure that all retirement data and payment contributions are reported accurately and timely, to prevent the school from incurring additional retirement contribution delinquency penalties in the future.

9. Vendor Payments Issued Reflecting Information Inconsistent with Revised Organizational Structure:

Based on the CSD’s review of documents provided by the school, the CSD noted a vendor payment that was supported by a lease agreement between the San Fernando Valley Japanese American Community Center and Youth Policy Institute [YPI] (Check # 307500, in the amount of \$9,500, dated 9/26/2019, which indicated that the check was for a 10/2019 Rent Payment). The CSD was informed that YPI, a former sole member of YPICS, had been removed from this sole member role—effective November 6, 2019, per YPICS’ Restated Articles of Incorporation, which, if accurate, potentially nullifies the lease agreement referenced above.

According to the school, the original lease was executed in 2005, and the terms were subsequently extended through June 30, 2021. Currently, YPICS is in the process of negotiating its next lease, which, upon completion, will reference YPICS as the lessee.

The CSD recommends that the school’s governing board and leadership team ensure that all payments made by the school originate from contracts executed either by the school itself or its charter operator. Further, the CSD recommends that the school’s governing board ensure that all service contracts are current, appropriately reviewed, and approved.

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

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

1. Organizational Decision to Forego Public Posting of the School’s Audited Financial Statements:

Bert Corona Charter does not post its audited financial statements to the school’s website. According to the school, a draft version of the school’s annual independent audit report is included with the school’s governing board meeting materials and is available online for public viewing as this item is raised for discussion during the governing board meeting. The school further states that, during other school events held throughout the year, parents and members of the community have the opportunity to obtain details regarding the school’s budget and its related financial information. In addition, the school advised the CSD that stakeholders may also obtain information regarding the school’s finances (including copies of the school’s audited financial statements), via the school’s Main Office. The CSD was provided with a copy of the school’s “Charter Transparency Request Form.”



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In order to ease the burden for all stakeholders and members of the public that have an interest in the school's finances (and demonstrate greater transparency), the CSD recommends that Bert Corona Charter post its current and future audited financial statements on its website.

2. Inadequate Controls Regarding Interorganizational Fund Transfers:

Based on the CSD's review of supporting documents provided by the school, the CSD noted two checks related to interorganizational fund transfers between bank accounts managed by YPICS (one check issued to Bert Corona Charter School, and one check issued to YPICS). Details regarding these transactions are summarized below.

Item #	Acct # Ending in	Check #	Payee	Amount	Description
1	X3232	1003858	Bert Corona Charter School	\$1,000,000.00	Transfer funds from WF TO PWB
2	X6905	306432	YPI Charter Schools, Inc.	\$100,000.00	Transfer funds from PWB TO CCU
TOTAL				\$1,100,000.00	

The two transfers summarized above include supporting documentation (from either the school's Executive Director or its back office services provider firm— i.e., copies of canceled checks, bank statements, and/or email requests), and indicate approval from the school's Executive Director. According to the school, its back office services provider firm monitors the school's cash accounts and, on a weekly basis, transmits a Cash Position Report that shows each account's current balance, all outstanding checks, and any other open items. The school further stated that this Cash Position Report is used as a tool to recommend interorganizational fund transfers as needed. According to the school, no formal approval process exists for these transfers.

Based on the CSD's review of YPICS' current fiscal policies and procedures, the CSD noted a lack of written guidance regarding interorganizational fund transfer requests and approvals, such as: (1) The individuals authorized to request transfers; (2) Permissible purposes for transfers; (3) The required documents to be included with transfer requests submitted for review, and (4) The name(s) and position/title(s) of the parties responsible for reviewing and approving such transfers.

The CSD recommends that YPICS revise its fiscal policies and procedures to incorporate guidelines that sufficiently outline the requirements governing interorganizational fund transfers, including protocols specifying the individuals authorized to request and review potential transfers, permissible purposes for transfers, and the required supporting documentation for transfers, to establish appropriate controls and enhance transparency.

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



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Corrective Action Required:

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



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1. Reviewed independent audit report for the fiscal year ended June 30, 2018 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 April 2019 through September 2019. Selected the months of June 2019 and July 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Wells Fargo Bank Business Checking Account Ending in X3232 (Operating Account, Bert Corona Charter)
 - b. US Bank Business Checking Account Ending in X0299 (Parent Account, Bert Corona Charter)
 - c. US Bank Business Checking Account Ending in X0552 (Student Body Account, Bert Corona Charter)
 - d. Pacific Western Bank Checking Account Ending in X6905 (Operating Account, Bert Corona Charter)
 - e. Pacific Western Bank Checking Account Ending in X7309 (Operating Account, Monseñor Oscar Romero Charter)
 - f. Pacific Western Bank Checking Account Ending in X7468 (Operating Account, Bert Corona Charter High)
 - g. Pacific Western Bank Checking Account Ending in X3491 (Construction Account, Monseñor Oscar Romero Charter)
 - h. Chase Bank Business Checking Account Ending in X0661 (Parent Account, Monseñor Oscar Romero Charter)
 - i. Chase Bank Business Checking Account Ending in X7817 (Student Body Account, Monseñor Oscar Romero Charter)
 - j. California Credit Union Business Checking Account Ending in X5561 (Operating Account, Bert Corona Charter)
3. Reviewed credit card statements from April 2019 through September 2019. Selected the months of April 2019 and August 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. California Credit Union Credit Card Ending in X0005 (Chief Operations Officer)
 - b. California Credit Union Credit Card Ending in X0013 (Executive Director)
 - c. California Credit Union Credit Card Ending in X0178 (Coordinator of Operations, Monseñor Oscar Romero Charter)
 - d. California Credit Union Credit Card Ending in X0194 (Assistant Executive Administrator, Bert Corona Charter High)
 - e. California Credit Union Credit Card Ending in X0251 (Executive Administrator, Monseñor Oscar Romero Charter)
 - f. California Credit Union Credit Card Ending in X0269 (Coordinator of Operations, Bert Corona Charter High)
 - g. California Credit Union Credit Card Ending in X0277 (Director of Operations, Bert Corona Charter)
 - h. California Credit Union Credit Card Ending in X0285 (Director of Technology)
 - i. Wells Fargo Bank Credit Card Ending in X4736 (Executive Director, account closed in April 2019)
4. Reviewed the following 55 checks and 10 electronic debit transactions. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Check numbers: 1003858; 1115; 1133; 1150; 1156; 1165; 01/31/19 – STRS; 306308; 306310; 306352; 306422; 306432; 306712; 306716; 306719; 306724; 306728; 306793; 306876; 306956; 306962; 307001; 307002; 307015; 307087; 307109; 307116; 307185; 307236; 307243; 307257; 307263; 307282; 307312; 307323; 307388; 307429; 307440; 307454; 307466; 307467; 307500; 307502; 307511; 307518; 307522; 307549; 307551; 307552; 307584; 307589; 307599; 307602; 307613; Q802580
 - b. ACH Debit Transactions (Checking Account Ending in X6905 – transaction dates): 6/3/2019; 6/6/2019; 6/11/2019; 6/12/2019; 6/13/2019; 6/24/2019; 7/1/2019; 7/3/2019; 7/5/2019; 7/9/2019



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5. Per the 2017-2018 audit report, the school's cash and cash equivalents is \$1,291,458, and total expenditures equal \$8,501,898. Therefore, the school's cash reserve level is 15.19%, 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. A Segregation of Duties (SOD) review was conducted at Monseñor Oscar Romero Charter. No discrepancies were noted.
8. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was not provided.
9. Reviewed student body financial records from April 2019 through September 2019. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
10. Pursuant to AB 1871, a signed written statement that indicates that Bert Corona Charter is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day (except as provided for a charter school that offers nonclassroom-based instruction) was provided.
11. Bert Corona Charter did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
12. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
13. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
14. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
15. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
16. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
17. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
18. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
19. Evidence of Bert Corona Charter offering STRS, PERS, a 403(b) Tax-Sheltered Annuity Plan, and/or Social Security benefits to its employees and proof of payment was provided.
20. Equipment inventory was provided.
21. The 2019-2020 LCAP was submitted to LAUSD.
22. The most current LCAP is posted on the charter school's website.
23. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school's website.
24. The most current Audited Financial Statements are not posted on the charter school's website. The CSD's observations were noted in the Other Observations section above.
25. The 2017-2018 audited and unaudited actuals nearly mirror each other.

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

N/A



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

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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 cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<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 cash balance at the beginning of the school year is positive; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

<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>
<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s). 	<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no significant recurring issues; and 17. Audited and unaudited actuals nearly mirror each other.
<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 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 	<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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

<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>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

<p><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. The cash balance at the beginning of the school year is positive; 3. 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. Governing board adopts the annual budget; 6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871); 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 	<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>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

<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>8. The LCAP is submitted to the appropriate agencies; 9. Have an audit conducted annually by an independent auditing firm; and 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.</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. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 2. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 3. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting; 4. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 5. Current audit shows no material weaknesses, deficiencies and/or findings; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. There is no apparent conflict of interest; and 8. Governing board approves any amendment(s) to the charter school's budget. <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>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.

A new school would be assessed as Unsatisfactory based on the statements below:

New Schools:

New Schools:

REQUIRED CRITERIA

1. A new school is one that does not have an independent audit on file with the Charter Schools Division;
2. The cash balance at the beginning of the school year is positive;
3. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement;
4. Projected debt is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;
5. Interim reports and unaudited actuals project:
 - a. Positive net assets
 - b. Expenses less than revenues
 - c. Projected expenses and revenues have no significant variance from budget
6. As a practice, the governing board receives and reviews the charter school's financial reports as evidenced by the governing board meeting minutes;
7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871);
8. The most current governing board-approved LCAP are posted on the charter school's website; and
9. The LCAP is submitted to the appropriate agencies.

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.

Note: 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.

Note: 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.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter - MIDDLE

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 12/13/2019

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



YPI CHARTER SCHOOLS

May 26, 2020

TO: YPI Charter Schools
Board of Directors

FROM: Yvette King-Berg
Executive Director

SUBJECT: Recommendation to receive and file LAUSD Annual Performance-Based Oversight Visit Reports for 2019-2020 School Year

BACKGROUND

The LAUSD Charter Schools Division (CSD) conducts yearly oversight visits and formal reviews of the instructional and operational practices of all District-authorized charter schools. All charter schools contribute a percentage of their operating revenue to the District for this purpose as required by law.

ANALYSIS

The LAUSD Charter Schools Division yearly conducts performance-based oversight aligned to the California Charter Schools Act and includes four categories and a sub-category: 1) Governance Documentation, 2) Student Achievement and Educational Performance Documentation, 3) Organizational Management, Programs, and Operations Documentation, 3A) Documentation of Compliance with DOJ and TB clearance, credentialing, ESSA requirements, and Mandated Reporter Training Requirements, etc., and 4) Fiscal Operations.

At the September 16, 2020 regular meeting of the YPICS Board of Directors, the oversight process utilized by the authorizing district, LAUSD, was presented to the Board as an information item, and at the December 9, 2020 meeting, the Board certified compliance with applicable laws and other requirements.

Specialists from the Charter Schools Division visited each YPICS during the months of December, January, and April as per the schedule below:

YPICS Fiscal Review:	November 20, 2019
Bert Corona Charter Middle Schools:	December 13, 2019
Bert Corona Charter High School:	February 19, 2020,
Monsenor Oscar Romero Charter School:	November 20, 2019

Final reports for BCCS and BCCHS were received and indicate the following:

SUMMARY OF RATINGS				
<i>(4) = Accomplished (3) = Proficient (2) = Developing (1) = Unsatisfactory</i>				
SCHOOL	Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
Bert Corona Charter School	3	2	1*	3
Bert Corona Charter High School	3	2	3**	3
Monsenor Oscar Romero Charter School ***	3	2	2	3

BCCS continues to work on moving the overall academic outcomes of the students at Bert. This table reflects the work that was implemented during the 2016-2017 school year. We anxiously await the Spring 2018 scores to reveal the increased focus on student outcomes this academic school year.

Because state standardized testing is not administered until 11th grade, the high school only has one set of CAASPP scores. Therefore, the high school’s 2 is reflective of 11 students who joined the high school when they were already behind in their sophomore year. We have continued to push those students and as of this writing nine of the have already been accepted and will be attending colleges and universities within California

*BCCS’ 18-19 Organizational and management score was a 3.

**BCHS’ 18-19 Organizational and management score was a 2.

***MORCS 18-19 All Scores for each area remained constant, no change.

RECOMMENDATION

It is recommended that the Board of Directors receive and file the 2019-2020 results of the District’s oversight review of the three YPI Charter Schools.



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2019-2020 SCHOOL YEAR

FOR

MONSEÑOR OSCAR ROMERO MIDDLE - 8196

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.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero Middle

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 11/20/2019

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

Charter School Name:		Monseñor Oscar Romero			Location Code:	8196
Current Address:			City:	ZIP Code:	Phone:	Fax:
2670 W. 11 th Street			Los Angeles	90006	213-413-9600	
Current Term of Charter:				LAUSD Board District:	LAUSD District:	
July 1, 2017 to June 30, 2022				2	Central	
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:		Grades Currently Served:	Grades To Be Served Per Charter:	
353		375		6-8	6-8	
Total Number of Staff Members:		Certificated:	Classified:			
34		17	17			
Charter School's Leadership Team Members:		Mary G. Keipp, Board Chari; Yvette King-Berg, ED; Rene Quon, EA, Ruben Dueñas, COO; Yesenia Zubia, HR Coordinator; Irina Castillo, Ex Ed.				
Charter School's Contact for Special Education:		Vashon Nutt, Director of Special Education				
CSD Assigned Administrator:		CSD Fiscal Services Manager:				
Dr. Blanca Alves-Monaster		Remedios Dizon				
Other School/CSD Team Members:		Yolanda Jordan, Specialist; Taylor Wichmanowski, Specialist; Emmaliza Baquir, Fiscal Manager				
Oversight Visit Date(s):		Fiscal Review Date (if different):				
November 20, 2019		N/A				
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(es) (if applicable):		Berendo Middle School		
Yes, via Long-Term Lease		DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:		May 1st through 17, 2019		

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	2	2	3



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero MiddleAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 11/20/2019

CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero Middle

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 11/20/2019

GOVERNANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>(G2) The Governing Board complies with most material provisions of the Brown Act. Per evidence in Binder 1:</p> <ul style="list-style-type: none"> • The YPICS Board meets on a regular basis (8/19/2019, 9/16/2019, 10/21/2019, 11/6/2019, and 1/18/2019). • Agendas and minutes are posted and included as a link on Board On Track. • Board takes and reports votes in open meeting by creating a motion to approve and calling Roll Call of Board members that are present at the meeting. <p>(G5) The Governing Board monitors school performance and other internal data to inform decision-making. Review of documents provided in Binder 1 revealed the following: The Youth Policy Institute Charter Schools (YPICS) discussed on Monday, June 17, 2019 via the Executive Director’s Report data collection in preparation for the 2019-2020 school year. As a result of reviewing data which was formative, summative and surveys the Board and the Leadership Team developed focus areas that include:</p> <ul style="list-style-type: none"> • Consistent Classroom Management Strategies in all classrooms to create emotionally safe spaces for ALL students (Relay GSE Instructional Leadership) • Support rigorous, thinking-rich classes (Relay GSE Instructional Leadership) • Weekly observation and feedback to teachers (Relay GSE Instructional Leadership) • Data focus: iReady • Joy • Decrease Chronic absenteeism to below 5% • Decrease suspension and expulsion below 3% • Increase student academic achievement in ELA and math by 5% <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>(G1) 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). Please note the following:</p> <ul style="list-style-type: none"> • As noted in 2018-2019 the organizational structure has leadership roles that overlap between the Chief Operations Officer and the Executive Administrator, per petition the organization has not been able to completely fulfill the terms of the petition. The YPICS leadership noted they are aware of this concern, however at this time the organization indicated they are not able to fulfill this part of the approved charter. • School Site Council/ELAC agendas and minutes- the school has had one meeting during the 2018-2019 school year and the School Advisory Council and ELAC meet together as evidenced by agendas and minutes. • On October 21, 2019 the Youth Policy Institute Charter Schools (YPICS) agendized a change in governance structure with a recommendation to approve updating board By-laws and Articles of Incorporation to remove YPI as the sole-statutory member of the YPI Charter Schools, Inc. CSD requests the organization forwards such changes of the documents and approved agendas and minutes once all has been completed to finalize requested Material Revision. 	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero MiddleAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 11/20/2019

(G2) CSD staff discussed with school leaders the need to ensure that the Board Meeting dates posted are aligned to actual Board meeting dates including required documentation; for example:

- October 28, 2019 Board Meeting Dates (UPDATED 9/11/19) versus the Board On Track –regular Meeting agenda dated October 21, 2019.
- August 19, 2019 on Board Meeting Dates for 2019-2020 with no evidence of agendas or minutes for such meeting on Board On Track

The YPICS leader noted that this will be referred back to the board.

(G3) 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, as evidenced by Binder 1:

- Review of the included Handbook revealed that it did not include for the school’s process for stakeholder complaints. Review of the Stakeholder Complaint Procedure revealed the following:
 1. The process for General Complaint procedures and the evidence of a flow chart presented in 1.12 does not match.
 2. Under school provides a meaningful opportunity to be heard: the complaint procedures provides a one-step complaint process that goes from resolving complaint informally to file a written complaint with the office to the Executive Director or Chair of the Board.
 3. Under school provides reasonable opportunity for fair appeal: it did not provide guidance to the stakeholder as to where, how, timeliness (only that the complainant may file a written complaint with the office of the Executive Director or Chair of The Board).
 4. Under school provides sufficiently clear advance notice of specific issue/proposed action: the school did not provide guidance to the stakeholder.
 5. The Stakeholder Complaint Procedure was not provided in other languages
 6. Steps informing stakeholders of follow up were not included.
- In order to address the items noted above, the YPICS leadership has shared that they will share the information with their board and will update the information as needed.

Corrective Action Required

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

Notes:

- (G1) The CSD requests the school provides evidence of ELAC delegating their duties to SAC and documentation as evidence for such change, please provide a response no later than **January 31, 2020**.
- (G5) The Board provided evidence of review and analysis of data to support sound decision-making. However, moving forward CSD noted a need for the Board to receive updates of systemic reviews of school performance data and other information in a format that addresses **each charter school individually** to be able to track growth and report consistently and independently of each other.

****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.***



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero Middle

Annual Performance-Based Oversight Visit Report

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

The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:

- Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations
- Evaluation of school’s executive level leadership

	Rubric	Sources of Evidence
Performance	<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 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 checked="" 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"/> Organizational 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 checked="" type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <input 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)



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G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

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:

- 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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input checked="" 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 (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 process
- 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 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 checked="" 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) <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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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) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> ESSA Grid <input type="checkbox"/> Other: (Specify)



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

The Governing Board has a system in place to ensure ongoing:	
<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 Monitoring of the school's implementation of its LCAP action plans and progress toward LCAP goals 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a 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)

G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6

The Governing Board has a system in place to ensure fiscal viability:	
<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
<p>Performance</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input type="checkbox"/> The school is fiscally weak (e.g., inadequate cash flow, etc.) and/or net assets are negative in the most current independent audit report, 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 (e.g., inadequate cash flow, etc.) and/or 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a 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 checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)



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

<i>The Governing Board has a system in place to ensure sound fiscal management and accountability:</i>	
<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> <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.)
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a 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



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STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	2
<p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO If yes, what is the school's identification? (See additional information within "Notes" section below) <input type="checkbox"/> Comprehensive Support and Improvement (CSI) <input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u> (A6) The school's percentage of "At Risk" English Learners is 0.7%, which is at rate lower than the Resident Schools Median of 1.9%. School leadership has indicated that in addition to the strategies provided on A5 above, students with lowest level of English, mostly newcomers, have been assigned to an ELD support class during the SFA block in the morning where they work with specific adaptive programs such as iReady, Achieve 3000 and Duolingo.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u> (A1) Some subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019, as follows: • 0.00% of English Learner students Met or Exceeded the Standards, a 2.11 percentage point decrease. • 21.32% of Latino students Met or Exceeded the Standards, a 0.54 percentage point increase. • 20.87% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, a 0.97 percentage point decrease. • 2.56% of Students with Disabilities Met or Exceeded the Standards, a 0.00 percentage point increase.</p> (A2) None of the school's subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019, as follows: • 0.00% of English Learner students Met or Exceeded the Standards, a 1.09 percentage point decrease. • 10.84% of Latino students Met or Exceeded the Standards, a 2.27 percentage point decrease. • 10.94% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, a 3.03 percentage point decrease. • 2.56% of Students with Disabilities Met or Exceeded the Standards, a 2.85 percentage point decrease. (A3) The schoolwide percentage of students who Met and Exceeded Standards in 6 th – 8 th Grade on the SBAC in ELA is 21.31%, which is at a rate lower than the Resident Schools Median of 25.35%. (A4) The schoolwide percentage of students who Met or Exceeded Standards in 6 th – 8 th Grade on the SBAC in Math is 10.98%, which is at a rate lower than the Resident Schools Median of 16.39%. <p>** (A1-A4) see (O4) and (O3) for the school leadership's plan to address the low performance in SBAC ELA and math (schoolwide and subgroup).</p>	



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(A5) The school reclassifies English Learners at 16.7%, which is at a rate lower than the Resident Schools Median of 18.9%. School leadership has reported that based on ELPAC results for the 2018-2019 school year, MORCS students performed best in oral domains while struggling mostly in the written domain. School leadership indicated that they have placed students in the reading intervention classes to ensure that supports are provided by mastery levels.

(A7) The school's percentage of LTELs is 26.6%, which is at a rate higher than the Resident Schools Median of 19.9%. In addition to A5-A6 above, the school leadership indicated that Success For All block and targeted instruction is provided for Long Term English learners.

Corrective Action Required

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

Notes:

YPICS's reclassification criteria are as follows:

- ◆ Comparison of performance in basic skills – earning C or better in their grade level English class.
- ◆ Assessment of English Proficiency – ELPAC Results, NWEA Maps (*iReady*)
- ◆ Teacher evaluation of student academic performance
- ◆ Parent opinion and consultation

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



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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 numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE) • In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school. 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <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 numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE) • In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school, 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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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 similar 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) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <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 and 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 similar 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) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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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 2018-2019 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input checked="" type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (within "Notes" section above) (B2.4) <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 2018-2019 (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 Resident Schools Median <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school's percentage of "At Risk" English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> "At-Risk" by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1)



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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 2018-2019 (CDE) 	
Performance	Sources of Evidence
<p>Rubric</p> <p><input type="checkbox"/> The school's percentage of LTELs is at rate lower than the Resident Schools Median</p> <p><input type="checkbox"/> The school's percentage of LTELs is at a rate similar to the Resident Schools Median</p> <p><input checked="" type="checkbox"/> The school's percentage of LTELs is at a rate higher than the Resident Schools Median</p> <p><input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median</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): 2018-2019</p> <p><input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1)</p>

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Four-Year Adjusted Cohort Graduation Rate (CDE) (high schools only) 	
Performance	Sources of Evidence
<p>Rubric</p> <p><input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median</p> <p><input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median</p> <p><input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median</p> <p><input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median</p> <p><input checked="" type="checkbox"/> No assessment of performance for this indicator</p>	<p><input type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE)</p> <p><input type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1)</p> <p><input type="checkbox"/> Graduation Requirements (within "Notes" section above) (B2.5)</p> <p><input type="checkbox"/> Other: (Specify)</p> <hr/> <p>A-G passing grade requirement (e.g. C or D) (CSD internal use only)</p>



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

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

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

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

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

	Rubric	Sources of Evidence
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, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input checked="" type="checkbox"/> No assessment of performance for this indicator.	<input type="checkbox"/> Internal academic performance and progress data and information (B2.2) <input type="checkbox"/> School Internal Assessment Data Report or equivalent (B2.6) <input type="checkbox"/> Other: (Specify)



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CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS

Summary of School Performance

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

I. Academic Performance

A10: CAASPP ENGLISH LANGUAGE ARTS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Red

Change Level: Declined

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

Performance Level Color: Red

Change Level: Declined

A12: ENGLISH LEARNER PROGRESS

Performance Level Color: Choose an item.

Change Level: Choose an item.

A13: COLLEGE/CAREER (high schools only)

Performance Level Color: Not Applicable

Change Level: Choose an item.

II. Academic Engagement

A14: CHRONIC ABSENTEEISM

Performance Level Color: Green

Change Level: Declined

A15: GRADUATION RATE

Performance Level Color: Not Applicable

Change Level: Choose an item.

III. Conditions and Climate

A16: SUSPENSION RATE

Performance Level Color: Yellow

Change Level: Declined

NOTES:

None



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

N/A



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ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	2
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<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. 200 and 300 reports indicate compliance. The Special Education coordinator is onsite once a week to observe, support, and coach teachers (there are two teachers, approximately 36 students with IEPs). At the time of the oversight there were no concerns noted regarding the 200 and 300 report.</p>	
<p><u>Areas Noted for Further Growth and/or Improvement</u></p>	
<p>(O1) 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. The Integrated Safe School Plan is included, however there is no evidence of the school’s participation with the plan. There is a MORCS Evacuation Map (note: the location from where the students were exiting from was wrongly marked on the map), emergency assembly area layout, and emergency team are included as part of the plan. The school indicates that the Great Shake did indeed occur but the documentation has not been located as of the day of the annual visit (11/20/2019). No other drills were indicated. There was a PD on 10/21/2019 that included the topic of “The Great Shake” as part of the agenda. Emergency Procedures and Drills as part of a PowerPoints were included that address lockdown run/hide/fight, fire, and earthquakes (similar concerns were noted on the 2018-2019 Annual Oversight Visit). The school leadership noted that they will devise a plan to ensure all students participate in drills throughout the year.</p>	
<p>(O3) The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS. As noted in 2018-2019 oversight and in responses by the leadership team it was indicated:</p> <ul style="list-style-type: none"> • The school is in the beginning stages of implementation of iReady, which includes differentiated instruction, online instruction, assessments and teacher resources. Per the leadership, the school is focusing on Math. • There is only diagnostic and intervention materials for ELA – the school leadership noted they are seeking to adopt the full ELA program next year. • For Science and Social science, the organization is in the process of adoption of similar curriculum. • Discussion with the school leaders included a need to move forward to full implementation of curriculum to ensure students are fully prepared to transition into the next level. The school leadership has indicated that the decline in ELA has been attributed to the transition to the new campus during the middle of the school year, which took away instructional time. • The scope of classroom observations was based on areas of focus identified in consultation with the charter school’s leadership. The following was observed in the classrooms visited: <ul style="list-style-type: none"> ○ 9/9 classrooms with word walls at different levels of use and conception. Graphic organizers were posted in classrooms however there was limited evidence of usage. ○ Collaborative learning: 5/9 classrooms were collaborating, although this was not clearly defined as students did not have distinct roles or tasks determined for structured collaboration. 	



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- Blended learning model: 3/9 classrooms were engaged in blended learning with grouping stations to support individualized small group instruction – students were working on iReady, Achieve 3000, and teacher led support. Google classrooms is being used to support the assignment completion. Teachers were providing more procedural support versus academic support to understand content being taught.
- RELAY: 4/9 classrooms at different levels of implementation. Observed good practices for transition and classroom management such as countdown for completion of tasks, timing and timers to ensure time on task and time lost is at a minimum. Continue to build capacity of the Phase 2 rigor in the classroom.

The school leadership and the organization’s leadership team shared that they will continue to define best practices being implemented at the school to continue to build staff’s capacity.

(O4) 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. The school will administer common assessment and performance tasks, in addition time is dedicated for data dives and the school has developed and discussed with the CSD their plan for next steps with departments and students, such as:

- In Math, the school opened a Math support class during the enrichment block to provide deeper interventions for students. Math support groups are made up of 2 classes per grade level consisting of 15-16 students.
- In addition, the school’s leadership indicated that teachers are using the iReady diagnostic results to group students strategically for instruction in Math and ELA as well as, use of stations in classrooms for blended learning and adaptive components of iReady for skill building. The school’s leadership indicated that as of November 15 they have only administered their first iReady diagnostic assessment and that the first week of December actionable growth data will be provided. However, the results of the iReady Diagnostic so far included:

iReady Diagnostic 1 READING

- Overall: 71.75% of students are on the At Risk Tier 3, 17.51% in Tier 2 and 10.73% in Tier 1
- English Learners: 96.12% of students are on At Risk Tier 3, 3.88% in Tier 2 and 0.00% in Tier 1
- Students with Special Needs: 94.29% of students are on At Risk Tier 3, 2.86% in Tier 2 and 2.86% in Tier 1

iReady Diagnostic 1 Math

- Overall: 67.70% of students are on the At Risk Tier 3, 26.69% in Tier 2 and 5.62% in Tier 1
- English Learners: 92.63% of students are on At Risk Tier 3, 7.77% in Tier 2 and 0.00% in Tier 1
- Students with Special Needs: 91.43% of students are on At Risk Tier 3, 8.57% in Tier 2 and 0.00% in Tier 1

- The school’s leadership shared that they are adjusting their practice using the data and information provided in their iReady diagnostic results to drive their lesson planning and approach to instruction in their classrooms to support all students and specific subgroups.

(O5) The school has partially implemented the key features of the educational program described in the charter, as noted in 2017-2018, 2018-2019 and this year during the visit, the school’s leadership noted that with the loss of staff this past years they are in the beginning stages of strengthening the key features of the charter, such as:

- The school leadership noted they continue to utilize Standards (Mastery) Based Grading in all general education classes for students to be accountable for mastery of their learning.
- There is an expectation of inquiry-and student-based learning where students are actively reading, writing, discussing and thinking to uncover the learning material as opposed to lectures, passively listeners and regurgitation to demonstrate mastery.



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- Technology integration one-to-one computer access for students in every classroom. Per conversation with leadership consider the intentionality of technology usage in the classroom.
- SFA class for 45-60 minutes, to practice reading, writing, listening and discussing skills in differentiated cohorts across the school.

Based on classroom observations the leadership reported that they will continue to work to build the capacity of their staff as they continue to work on retention of teachers to build full mastery of the key features of the educational program.

- (O8) 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. Trainings have been provided by iReady Diagnostic Curriculum Associates, a data dive on September 23, 2019; November 4, training topic was on a “critical friends” protocol. Conversations with the leadership team and the stakeholders interviewed, revealed a need to continue to define the professional development sessions to ensure that time spent in professional development truly fulfills the professional growth needs of the staff. Teachers interviewed noted a need for time to look at data cycles, to develop experts in teaching practices and for creating good habits of minds during meetings of always infusing data to quantify and evaluate progress. In addition the staff suggested that professional development be moved to a different day of the week (to maximize days since many holidays fall on Mondays).
- (O11) 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. School leadership reported:
- They are in the beginning stages of developing a coaching cycle to support the needs of their staff. The school administration (two staff members) have attended the Relay Graduate School of Education that provide a scope and sequence platform for teacher growth based on their current level of performance.
 - Coaching is split between 4 members of the instructional leadership team. There is a focus for the first 3 months on the management trajectory and data meetings with teachers who are ready to move on to a particular element of coaching.
- (O12) 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 requirement. CSD discussed with the school leaders the need to ensure all staff members have cleared credentials as it was noted that two returning employees marked as Teacher Associates do not have the proper EL authorization. In summary, currently 5 teachers were listed as “Teacher Associates” due to no EL authorization, at the time of the oversight the school leader had a substitute teacher working in each of those classrooms to ensure that the school is in compliance with this requirement.

Corrective Action Required

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



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Notes:
None

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



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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
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 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 checked="" 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 (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> (“ESSA Grid”) (B3A.1) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
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 (B3.2a) <input checked="" type="checkbox"/> Evidence of student immunization (B3.2b) <input checked="" type="checkbox"/> Evidence of health screening (B3.2b) <input checked="" type="checkbox"/> Evidence of Epi-pen (B3.2c) <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <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

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), and the California Next Generation Science Standards (CA NGSS) that are applicable to the grade levels served
- 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 & CA NGSS <input type="checkbox"/> The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input checked="" type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input type="checkbox"/> Evidence of implementation of CA NGSS (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3.3c) *new schools only <input type="checkbox"/> WASC documentation (B3.3d) <input type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3.3i) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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

<i>The school:</i>	
<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 standards-based instruction, progress monitoring, assessment, and reclassification) • Has appointed a designee to assist and support foster youth 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.3j) <input checked="" type="checkbox"/> Implementation of the school’s English Learner Master Plan (B3.3j) <input checked="" type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <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
<p>Performance</p> <ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3.3k) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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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 (B3.4b) <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j) <input type="checkbox"/> Self-Review Checklist (B3.4a) <input checked="" type="checkbox"/> Other special education documentation (B3.4a) <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 (B3.4a) <input type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.4c) <input type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3.4c) <input type="checkbox"/> Evidence of implementation of alternatives to suspension (B3.4c) <input type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3.4c) <input type="checkbox"/> Evidence of data monitoring (B3.4c) <input type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, and disproportionality (B2.1) <input type="checkbox"/> Suspension rates, and disproportionality rates <input type="checkbox"/> Evidence of implementation of AB 2291 (B3.4c) <input checked="" type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

The school:

- 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 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 checked="" 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 (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" 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

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

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

Rubric		Sources of Evidence
Performance	<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 type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <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 (B3.4d) <input type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school’s approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) grades 6-12 (B3.4d) <input checked="" type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



LAUSD CHARTER SCHOOLS DIVISION

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

**required on website

	Rubric	Sources of Evidence
Performance	<p><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</p> <p><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</p> <p><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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for:</p> <ul style="list-style-type: none"> • UCP Procedure and Forms • Complaint Forms • SB 1375 Information • AB 2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics • Student Achievement Information <p><input checked="" type="checkbox"/> Evidence of implementation of AB 2022 (B3.4e)</p> <p><input type="checkbox"/> Other: (Specify)</p>



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

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



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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 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 checked="" type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero Middle

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Location Code: **8196**
 School Name: **Monseñor Oscar Romero Charter Middle**
 FY Start Date: **2006-07**

Charter #: **931**
 CDS Code: **1964733 0114959**

8196	2016-17					2017-18					2018-19				
	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
Monseñor Oscar Romero Charter Middle															
Cash and Cash Equivalents		897,123	855,159	13,267,672	13,267,671		1,210,062	1,206,380	5,514,805	5,461,380		0	1,601,636	2,788,432	0
Current Assets		1,356,628	1,298,129	13,624,340	13,624,341		1,662,547	1,643,137	5,883,465	5,882,314		0	2,242,231	3,350,157	0
Fixed and Other Assets		1,491,997	1,628,842	6,313,777	6,400,377		15,756,756	15,757,006	23,126,870	23,423,020		0	30,279,989	28,913,251	0
Total Assets		2,848,624	2,926,971	19,938,117	20,024,718		17,419,302	17,400,143	29,010,335	29,305,334		0	32,522,220	32,263,408	0
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		177,526	195,673	12,217,600	12,232,086		209,960	190,142	4,078,263	4,106,556		0	605,702	1,136,672	0
Long Term Liabilities		727,417	727,417	3,142,272	3,171,088		7,869,977	7,869,977	7,903,472	7,848,092		0	7,772,940	7,844,033	0
Total Liabilities		904,943	923,090	15,359,872	15,403,174		8,079,938	8,060,119	11,981,735	11,954,648		0	8,378,642	8,980,704	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		1,943,681	2,003,881	4,578,245	4,621,544		9,339,365	9,340,024	17,028,600	17,350,686		24,643,712	24,143,578	23,282,704	0
Total Revenues	3,932,748	4,010,998	4,046,235	6,525,393	6,568,692	10,242,847	8,786,825	8,886,942	16,323,670	16,645,758	4,483,526	11,904,245	11,384,621	11,223,654	0
Total Expenditures	3,860,649	3,965,089	3,940,127	3,844,921	3,844,921	4,229,658	4,069,005	4,168,462	3,916,614	3,916,614	4,350,205	4,289,133	4,269,644	5,291,639	0
Net Income / (Loss)	72,099	45,908	106,108	2,680,472	2,723,771	6,013,189	4,717,820	4,718,480	12,407,056	12,729,142	133,321	7,615,112	7,114,977	5,932,015	0
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	72,099	45,908	106,108	2,680,472	2,723,771	6,013,189	4,717,820	4,718,480	12,407,056	12,729,142	133,321	7,615,112	7,114,977	5,932,015	0
Net Assets, Beginning	1,697,137	1,897,773	1,897,773	1,897,773	1,897,773	2,003,881	4,578,245	4,578,245	4,578,245	4,621,544	19,136,923	17,028,600	17,028,601	17,028,600	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	43,300	43,299	43,299	43,299	0	0	0	322,089	0
Net Assets, Beginning, Adjusted	1,697,137	1,897,773	1,897,773	1,897,773	1,897,773	2,003,881	4,621,545	4,621,544	4,621,544	4,621,544	19,136,923	17,028,600	17,028,601	17,350,689	0
Net Assets, End	1,769,236	1,943,681	2,003,881	4,578,245	4,621,544	8,017,070	9,339,365	9,340,024	17,028,600	17,350,686	19,270,244	24,643,712	24,143,578	23,282,704	0

8196	Audited Financials					2019-20				
	2015-16	2016-17	2017-18	2018-19	2019-20	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Monseñor Oscar Romero Charter Middle										
Cash and Cash Equivalents	873,810	13,267,671	5,461,380	0	0		0	0	0	0
Current Assets	1,351,149	13,624,341	5,882,314	0	0		0	0	0	0
Fixed and Other Assets	1,489,468	6,400,377	23,423,020	0	0		0	0	0	0
Total Assets	2,840,617	20,024,718	29,305,334	0	0		0	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	229,848	12,232,086	4,106,556	0	0		0	0	0	0
Other Long Term Liabilities	712,996	3,171,088	7,848,092	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	942,844	15,403,174	11,954,648	0	0		0	0	0	0
Net Assets	1,897,773	4,621,544	17,350,686	0	0		0	0	0	0
Total Revenues	4,024,141	6,568,692	16,645,758	0	0	4,538,877	0	0	0	0
Total Expenditures	3,571,988	3,844,921	3,916,616	0	0	5,182,703	0	0	0	0
Net Income / (Loss)	452,153	2,723,771	12,729,142	0	0	(643,826)	0	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	452,153	2,723,771	12,729,142	0	0	(643,826)	0	0	0	0
Net Assets, Beginning	1,445,620	1,897,773	4,621,544	0	0	24,143,577	0	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	(498,852)	0	0	0	0
Net Assets, Beginning, Adjusted	1,445,620	1,897,773	4,621,544	0	0	23,644,725	0	0	0	0
Net Assets, End	1,897,773	4,621,544	17,350,686	0	0	23,000,899	0	0	0	0



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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> <p>Monseñor Oscar Romero Charter’s fiscal condition is positive and has been upward trending since the 2015-2016 fiscal year. According to the 2017-2018 independent audit report, the school had positive net assets of \$17,350,686 and net income of \$12,729,142. The 2018-2019 Unaudited Actuals project positive net assets of \$23,282,701 and net income of \$5,932,015.</p> <p>According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2018, Monseñor Oscar Romero Charter is one of three schools operated by YPICS, all of which are currently authorized by the Los Angeles Unified School District (LAUSD). YPICS’ fiscal condition is strong. YPICS and its charter schools reported positive net assets of \$20,684,230 and net income of \$12,857,680. YPICS, without its charter schools, reported positive net assets of \$365 and net income of \$365. According to YPICS, there are no management fees charged to Monseñor Oscar Romero Charter or the other charter schools that it operates. Instead, each school pays a portion of the actual expenses for shared costs and administrative services that are related to the organization as a whole. These costs are allocated based on the Average Daily Attendance (ADA) for each school.</p> <p>Areas of Demonstrated Strength and/or Progress:</p> <p>1. The school’s fiscal condition is positive.</p>						3
	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Unaudited Actuals)	2019-2020 (Preliminary Budget)	
Net Assets	\$1,897,773	\$4,621,544	\$17,350,686	\$23,282,701	\$22,638,875	
Net Income/ <i>Loss</i>	\$452,153	\$2,723,771	\$12,729,142*	\$5,932,015*	(\$643,826)	
Transfers In/ <i>Out</i>	\$0	\$0	\$0	\$0	\$0	
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0	
<p>*Note: The significant increases in the school’s fiscal performance were due to Proposition 1D funds received in Fiscal Years 2016-2017 and 2017-2018, and LAUSD Augmentation Grant funds received in Fiscal Year 2018-2019.</p>						



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero MiddleAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: **11/20/2019****Areas Noted for Further Growth and/or Improvement:**

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

1. Untimely Bank Deposits:

Based on the CSD's review of the school's bank statements for the period from April 2019 through September 2019, a sample of 15 deposit transactions were randomly selected for further review. The CSD noted two bank deposits that were made late (based on the requirements outlined in the school's fiscal policies and procedures). Details regarding these deposits are provided below.

Item #	Account # Ending in	Date Funds Collected	Date Funds Deposited	Number of Days Late	Deposit Amount
1	X0661	6/7/2019	6/24/2019	2	\$2,060.00
2	X0661	6/24/2019	7/8/2019	1	\$3,411.00
TOTAL					\$5,471.00

Page 7 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "Deposits will be made within ten business days."

According to the school, its leadership team will discuss this policy with its staff to ensure that all funds collected are deposited in a timely manner. Further, the school stated that, in January 2020, training on the school's fiscal policies and procedures will be provided to all staff, and weekly reminders will be sent to all designated depositors to ensure that all funds collected in the future are deposited timely.

The CSD recommends that the school's Chief Operations Officer, its Executive Administrator/Assistant Executive Administrator (or the authorized designee), who bears the responsibility of reviewing and approving deposits, ensure that all funds collected are deposited timely, and appropriate controls are established, to prevent the school's funds from being deposited late in the future.

2. Lack of Documented Approvals of Bank Reconciliation Reports:

Based on the CSD's review of a sample of the school's Bank Reconciliation Reports for the period from April 2019 through September 2019, the CSD noted that the August 2019 Bank Reconciliation Report for the Checking Account Ending in X7817 lacked evidence of approval.



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Page 2 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Accounting Manager or Vice President, School Finance assigned to the organization will review and approve the bank reconciliation by initialing and dating the report.”

According to the school’s back office services provider firm, all of the school’s Bank Reconciliation Reports are prepared and approved electronically, and its financial software does not permit the completion of the next bank reconciliation cycle until the current Bank Reconciliation Report has been approved.

The CSD recommends that the school consistently prepare and approve all Bank Reconciliation Reports in the manner outlined in its fiscal policies and procedures, and ensure that all future Bank Reconciliation Reports are prepared accurately, reviewed and approved in a timely manner, and include the appropriate signatures (including the printed names and titles/positions), as well as the preparation and review/approval dates, to validate the review and approval processes performed by the school.

3. Checks Outstanding for 90 Days or More:

Based on the CSD’s review of the school’s Bank Reconciliation Reports, the CSD noted an employee reimbursement check that, as of September 30, 2019, had been outstanding for more than 90 days (Check # 307101, in the amount of \$32.82, dated 6/7/2019).

The school stated that the check referenced above was researched and investigated before it was voided and reissued.

The CSD recommends that the school update its fiscal policies and procedures, to provide guidance and establish expectations for its staff regarding the research, investigation, write-off, and reissuance of checks that have been outstanding for specified periods of time.

4. Lack of Documented Pre-Approval for Travel Expenses:

Based on the CSD’s review of the school’s credit card statements and 40 sample transactions for the period spanning from April 2019 through September 2019, the CSD noted two travel-related charges that lacked evidence of pre-approval from the school’s Executive Director. Details regarding these transactions are provided below.

Item #	Acct # Ending in	Transaction Date	Vendor Name	Amount	Transaction Description
1	X0194	4/9/2019	Airbnb	\$471.92	Room accommodations for State speech and debate competition
2	X0194	4/16/2019	Airbnb	\$214.83	Lodging for college trip to UC Merced and SFSU
TOTAL				\$686.75	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Executive Director must pre-approve all school related travel.”



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According to the school, all school-related travel plans are discussed and approved during the school's leadership team check-in meetings.

The CSD recommends that the school's governing board require the school's leadership team to establish more stringent controls in this area and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.

5. Lack of Documented Pre-Approvals for Employee Reimbursements:

Based on the CSD's review of the school's check register for the period from November 2018 through October 2019, a sample of 55 transactions were selected for further review. The CSD noted three employee reimbursements that lacked evidence of pre-approval from either the school's Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. The reimbursements in question are summarized below.

Item #	Reimbursement Check Issuance Date	Check #	Payee	Reimbursement Check Amount	Transaction Description
1	11/16/2018	306352	School Employee	\$82.01	Parent conference breakfast
2	12/6/2018	306422	School Employee	\$91.93	Food for MORCS DVR
3	5/10/2019	307002	School Employee	\$74.00	ORO Tel Inc. – Live Scan
TOTAL				\$247.94	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "An employee or school volunteer seeking to make a school-related purchase must obtain pre-approval from the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator."

During the CSD's fiscal review of the school in the previous year (2018-2019), the CSD noted six employee reimbursements that lacked evidence of pre-approvals from the school's Executive Director, its Chief Operations Officer, or its the Executive Administrator and, in response, the school advised the CSD that the school's leadership team would develop a Pre-Approval Form to ensure that all future pre-approvals of employee reimbursements were documented.

However, during the current year's fiscal review (2019-2020), the school informed the CSD that the Pre-Approval Form referenced by the school in 2018-2019 was not actually implemented in 2019-2020 (because the school considers the Form cumbersome). The school further advised the CSD during the 2019-2020 fiscal review that, instead of implementing this Pre-Approval Form, the school intends to revise its fiscal policies and procedures and will propose an acceptable method of employee reimbursement pre-approval to its governing board for consideration (which, according to the school, could include some form of email approval or other documentation).



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The CSD recommends that the school’s governing board require the school’s leadership team to establish more stringent controls in this area, and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.

6. Lack of Documented Approval for Purchase Requisitions/Purchase Orders:

Based on the CSD’s review and analysis of supporting documents provided by the school, the CSD noted a vendor payment that was not supported by a purchase order reflecting documented approval from either the school’s Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. Details regarding the vendor payment in question are provided below.

Check #	Check Issuance Date	Vendor	Description	Amount	CSD’s Comments
307440	8/29/2019	Lakeshore Learning Materials	Classroom supplies - BCCS	\$282.26	Purchase order not signed/approved
			Classroom supplies - BCCHS	\$801.19	
			Classroom supplies - MORCS	\$908.86	
TOTAL				\$1,992.31	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “All purchases over \$500 require a purchase requisition. The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator will approve the purchase requisition after determining:

- If the expenditure is budgeted.
- If funds are available for the expenditure.
- If the expenditure is allowable under the appropriate revenue source.
- If the expenditure is appropriate and consistent with the vision, approved charter, school policies and procedures and any related laws or applicable regulations.
- If the price is competitive and prudent and proper bidding procedures have been followed.”

According to the school, its leadership team will review all of the school’s purchase orders and purchase requisitions and ensure that the appropriate approvals are documented therein.



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The CSD recommends that the school strictly adhere to its governing board-approved fiscal policies and procedures to ensure that complete supporting documents are submitted and appropriate approvals are obtained for all applicable transactions, including purchase orders.

7. Bank Service Fees and Charges on Student Body and Parent Accounts:

Based on the CSD's review of the school's bank statements, the CSD noted the following bank fees and charges:

Item #	Acct # Ending in	Statement Closing Date	Transaction Amount	Transaction Description
1	X7817	4/30/2019	\$12.00	Monthly Service Fee
2	X7817	5/31/2019	\$12.00	Monthly Service Fee
3	X0299	7/31/2019	\$24.80	Analysis Service Charge: Returned Deposited Items (\$14.00) and Branch Coin/Currency Services (\$10.80)
4	X0552	7/31/2019	\$0.30	Analysis Service Charge: Branch Coin/Currency Services
5	X0661	7/31/2019	\$22.01	Cash Deposit Immediate: Excess Cash Deposits
6	X0299	8/31/2019	\$29.70	Analysis Service Charge: Branch Coin/Currency Services
7	X0299	9/30/2019	\$12.90	Analysis Service Charge: Branch Coin/Currency Services
TOTAL			\$113.71	

The CSD was informed that the school's leadership team is considering changing financial institutions for its Student Body and Parent bank accounts.

The CSD recommends that the school regularly review all of its bank statements, note all assessed service fees or charges, and consider alternatives for eliminating or reducing such charges.

8. Penalties Incurred for Late Retirement Contribution Payments to California State Teachers' Retirement System (CalSTRS):

Based on the CSD's review of the school's check register, a CalSTRS contribution payment was selected for further review. The CSD noted that the supporting documents provided for this payment, which was made on or about 1/31/2019 (in the amount of \$93,221.95, payable to the Los Angeles County Office of Education—in reference to the school's November 2018 contribution), included a delinquency penalty of \$34.18.

According to the Los Angeles County Office of Education, delinquency penalties are assessed when mandatory CalSTRS contribution payments are made later than the specified payment periods (pursuant to the California Education Code).

According to the school, its CalSTRS contribution payments are challenging for it to manage, due to unforeseen factors that may require subsequent changes to its calculations (such as part-time employee hours, staff changes, policy changes, etc.).



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The CSD recommends that the school’s Executive Director, who bears the responsibility for all operations and activities related to financial management, ensure that all retirement data and payment contributions are reported accurately and timely, to prevent the school from incurring additional retirement contribution delinquency penalties in the future.

9. Vendor Payments Issued Reflecting Information Inconsistent with Revised Organizational Structure:

Based on the CSD’s review of documents provided by the school, the CSD noted a vendor payment that was supported by a lease agreement between the San Fernando Valley Japanese American Community Center and Youth Policy Institute [YPI] (Check # 307500, in the amount of \$9,500, dated 9/26/2019, which indicated that the check was for a 10/2019 Rent Payment). The CSD was informed that YPI, a former sole member of YPICS, had been removed from this sole member role—effective November 6, 2019, per YPICS’ Restated Articles of Incorporation, which, if accurate, potentially nullifies the lease agreement referenced above.

According to the school, the original lease was executed in 2005, and the terms were subsequently extended through June 30, 2021. Currently, YPICS is in the process of negotiating its next lease, which, upon completion, will reference YPICS as the lessee.

The CSD recommends that the school’s governing board and leadership team ensure that all payments made by the school originate from contracts executed either by the school itself or its charter operator. Further, the CSD recommends that the school’s governing board ensure that all service contracts are current, appropriately reviewed, and approved.

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

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

1. Organizational Decision to Forego Public Posting of the School’s Audited Financial Statements:

Monseñor Oscar Romero Charter does not post its audited financial statements to the school’s website. According to the school, a draft version of the school’s annual independent audit report is included with the school’s governing board meeting materials and is available online for public viewing as this item is raised for discussion during the governing board meeting. The school further states that, during other school events held throughout the year, parents and members of the community have the opportunity to obtain details regarding the school’s budget and its related financial information. In addition, the school advised the CSD that stakeholders may also obtain information regarding the school’s finances (including copies of the school’s audited financial statements), via the school’s Main Office. The CSD was provided with a copy of the school’s “Charter Transparency Request Form.”



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In order to ease the burden for all stakeholders and members of the public that have an interest in the school’s finances (and demonstrate greater transparency), the CSD recommends that Monseñor Oscar Romero Charter post its current and future audited financial statements on its website.

2. Inadequate Controls Regarding Interorganizational Fund Transfers:

Based on the CSD’s review of supporting documents provided by the school, the CSD noted two checks related to interorganizational fund transfers between bank accounts managed by YPICS (one check issued to Bert Corona Charter School, and one check issued to YPICS). Details regarding these transactions are summarized below.

Item #	Acct # Ending in	Check #	Payee	Amount	Description
1	X3232	1003858	Bert Corona Charter School	\$1,000,000.00	Transfer funds from WF TO PWB
2	X6905	306432	YPI Charter Schools, Inc.	\$100,000.00	Transfer funds from PWB TO CCU
TOTAL				\$1,100,000.00	

The two transfers summarized above include supporting documentation (from either the school’s Executive Director or its back office services provider firm— i.e., copies of canceled checks, bank statements, and/or email requests), and indicate approval from the school’s Executive Director. According to the school, its back office services provider firm monitors the school’s cash accounts and, on a weekly basis, transmits a Cash Position Report that shows each account’s current balance, all outstanding checks, and any other open items. The school further stated that this Cash Position Report is used as a tool to recommend interorganizational fund transfers as needed. According to the school, no formal approval process exists for these transfers.

Based on the CSD’s review of YPICS’ current fiscal policies and procedures, the CSD noted a lack of written guidance regarding interorganizational fund transfer requests and approvals, such as: (1) The individuals authorized to request transfers; (2) Permissible purposes for transfers; (3) The required documents to be included with transfer requests submitted for review, and (4) The name(s) and position/title(s) of the parties responsible for reviewing and approving such transfers.

The CSD recommends that YPICS revise its fiscal policies and procedures to incorporate guidelines that sufficiently outline the requirements governing interorganizational fund transfers, including protocols specifying the individuals authorized to request and review potential transfers, permissible purposes for transfers, and the required supporting documentation for transfers, to establish appropriate controls and enhance transparency.

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



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Corrective Action Required:

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



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SCHOOL NAME: Monseñor Oscar Romero MiddleAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 11/20/2019**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2018 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 April 2019 through September 2019. Selected the months of June 2019 and July 2019 for sample testing. Discrepancies were noted for further growth and/or improvement above.
 - a. Wells Fargo Bank Business Checking Account Ending in X3232 (Operating Account, Bert Corona Charter)
 - b. US Bank Business Checking Account Ending in X0299 (Parent Account, Bert Corona Charter)
 - c. US Bank Business Checking Account Ending in X0552 (Student Body Account, Bert Corona Charter)
 - d. Pacific Western Bank Checking Account Ending in X6905 (Operating Account, Bert Corona Charter)
 - e. Pacific Western Bank Checking Account Ending in X7309 (Operating Account, Monseñor Oscar Romero Charter)
 - f. Pacific Western Bank Checking Account Ending in X7468 (Operating Account, Bert Corona Charter High)
 - g. Pacific Western Bank Checking Account Ending in X3491 (Construction Account, Monseñor Oscar Romero Charter)
 - h. Chase Bank Business Checking Account Ending in X0661 (Parent Account, Monseñor Oscar Romero Charter)
 - i. Chase Bank Business Checking Account Ending in X7817 (Student Body Account, Monseñor Oscar Romero Charter)
 - j. California Credit Union Business Checking Account Ending in X5561 (Operating Account, Bert Corona Charter)
3. Reviewed credit card statements from April 2019 through September 2019. Selected the months of April 2019 and August 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. California Credit Union Credit Card Ending in X0005 (Chief Operations Officer)
 - b. California Credit Union Credit Card Ending in X0013 (Executive Director)
 - c. California Credit Union Credit Card Ending in X0178 (Coordinator of Operations, Monseñor Oscar Romero Charter)
 - d. California Credit Union Credit Card Ending in X0194 (Assistant Executive Administrator, Bert Corona Charter High)
 - e. California Credit Union Credit Card Ending in X0251 (Executive Administrator, Monseñor Oscar Romero Charter)
 - f. California Credit Union Credit Card Ending in X0269 (Coordinator of Operations, Bert Corona Charter High)
 - g. California Credit Union Credit Card Ending in X0277 (Director of Operations, Bert Corona Charter)
 - h. California Credit Union Credit Card Ending in X0285 (Director of Technology)
 - i. Wells Fargo Bank Credit Card Ending in X4736 (Executive Director, account closed in April 2019)
4. Reviewed the following 55 checks and 10 electronic debit transactions. Discrepancies were noted for further growth and/or improvement above.
 - a. Check numbers: 1003858; 1115; 1133; 1150; 1156; 1165; 01/31/19 – STRS; 306308; 306310; 306352; 306422; 306432; 306712; 306716; 306719; 306724; 306728; 306793; 306876; 306956; 306962; 307001; 307002; 307015; 307087; 307109; 307116; 307185; 307236; 307243; 307257; 307263; 307282; 307312; 307323; 307388; 307429; 307440; 307454; 307466; 307467; 307500; 307502; 307511; 307518; 307522; 307549; 307551; 307552; 307584; 307589; 307599; 307602; 307613; Q802580
 - b. ACH Debit Transactions (Checking Account Ending in X6905, transaction dates): 6/3/2019; 6/6/2019; 6/11/2019; 6/12/2019; 6/13/2019; 6/24/2019; 7/1/2019; 7/3/2019; 7/5/2019; 7/9/2019
5. Per the 2017-2018 audit report, the school's cash and cash equivalents is \$5,461,380, and total expenditures equal \$3,919,616. Therefore, the school's cash reserve level is 139.33%, which exceeds the recommended 5%.



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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. A Segregation of Duties (SOD) review was conducted at Monseñor Oscar Romero Charter. No discrepancies were noted.
8. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
9. Reviewed student body financial records from April 2019 through September 2019. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
10. Pursuant to AB 1871, a signed written statement that indicates that Monseñor Oscar Romero Charter is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
11. Monseñor Oscar Romero Charter did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
12. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
13. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
14. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
15. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
16. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
17. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
18. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
19. Evidence of Monseñor Oscar Romero Charter offering STRS, PERS, a 403(b) Tax-Sheltered Annuity Plan, and/or Social Security benefits to its employees and proof of payment was provided.
20. Equipment inventory was provided.
21. The 2019-2020 LCAP was submitted to LAUSD.
22. The most current LCAP is posted on the charter school's website.
23. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school's website.
24. The most current Audited Financial Statements are not posted on the charter school's website. The CSD's observations were noted in the Other Observations section above.
25. The 2017-2018 audited and unaudited actuals do not mirror each other. According to the school, the variances were due to the following: 1) Costs that were not accrued timely due to an invoice received from LAUSD in July 2018 related to the construction of the school's new building—which was beyond the school's cut-off date for reporting its unaudited actuals, and 2) The overstated accrual amount resulting from the reconciliation of the school's Prop 1D loan balance.

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

N/A



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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 cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<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 cash balance at the beginning of the school year is positive; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



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<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>
<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s). 	<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no significant recurring issues; and 17. Audited and unaudited actuals nearly mirror each other.
<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 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 	<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



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<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>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

<p><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. The cash balance at the beginning of the school year is positive; 3. 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. Governing board adopts the annual budget; 6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871); 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 	<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>



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<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>8. The LCAP is submitted to the appropriate agencies; 9. Have an audit conducted annually by an independent auditing firm; and 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.</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. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 2. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 3. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting; 4. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 5. Current audit shows no material weaknesses, deficiencies and/or findings; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. There is no apparent conflict of interest; and 8. Governing board approves any amendment(s) to the charter school's budget. <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>



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<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. The cash balance at the beginning of the school year is positive; 3. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement; 4. Projected debt is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school; 5. 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 6. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes; 7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 8. The most current governing board-approved LCAP are posted on the charter school’s website; and 9. The LCAP is submitted to the appropriate agencies. <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>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>



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



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

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT* **2019-2020 SCHOOL YEAR** **FOR**

BERT CORONA CHARTER HIGH - 7598

Name and Location Code of Charter School

LAUSD Vision

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

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/19/2020

Charter School Name:		Bert Corona Charter High			Location Code:	7598
Current Address:		City:	ZIP Code:	Phone:	Fax:	
12513 Gain Street		Pacoima	91331	(818) 480-6810		
Current Term of Charter:			LAUSD Board District:	LAUSD District:		
July 1, 2015 to June 30, 2020			6	NE		
Number of Students Currently Enrolled:	Enrollment Capacity Per Charter:	Grades Currently Served:		Grades To Be Served Per Charter:		
197	500	9-12		9-12		
Total Number of Staff Members:	21	Certificated:	13	Classified:	8	
Charter School's Leadership Team Members:		Yvette King-Bert, Executive Director Yolanda Fuentes, Assistant Executive Administrator Nestor Garcia, Lead Teacher Walter Njboke, Board Member Diana Gamez, Senior Director of Programs			Larry Simonsen, Executive Director Ruben Dueñas, COO Max Garcia, Counselor Yesenia Zubia, HR Coordinator	
Charter School's Contact for Special Education:		Vashon Nutt, Director of Special Education				
CSD Assigned Administrator:	Dr. Alves-Monaster		CSD Fiscal Services Manager:	Remedios Dizon		
Other School/CSD Team Members:	Monique Galvez, Specialist					
Oversight Visit Date(s):	February 19, 2020		Fiscal Review Date (if different):	N/A		
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	Prop 39		LAUSD Co-Location Campus(es) (if applicable):	Maclay Middle School		
			DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:	May 14, 2019		

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	2	3	3



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CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

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

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



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GOVERNANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>(G1) Evidence of School Advisory Council meetings was provided as part of Binder 1, dates: September 11, 2019, October 9, 2019, December 4, 2019 and January 29, 2020. Topics included LCAP 2019-2020 Budget and subsequently Budget Update, iReady Assessments, WASC, New Grading System, College Application Update, School Culture and Climate Update.</p> <p>(G2) The Governing Board complies with most material provisions of the Brown Act. Board meeting dates are posted with required documentation, such as:</p> <ul style="list-style-type: none"> • Agendas include conference call number, opportunity for public comment, guidelines when addressing the board, and opportunities aligned to the Americans with Disabilities Act. • Per evidence on agenda and minutes, the Brown Act training was conducted 2/20/2020. <p>(G3) Uniform Complaint procedures are included and has all required elements.</p> <p>(G5) The Governing Board monitors school performance and other internal data to inform decision-making. The Youth Policy Institute Charter Schools (YPICS) discussed on Monday, June 17, 2019, via the Executive Director’s Report data collection in preparation for the 2019-2020 school year. As a result of reviewing data which was formative, summative and surveys the Board and the Leadership Team developed focus areas that include:</p> <ul style="list-style-type: none"> • Consistent Classroom Management Strategies in all classrooms to create emotionally safe spaces for ALL students (Relay GSE Instructional Leadership) • Support rigorous, thinking-rich classes (Relay GSE Instructional Leadership) • Weekly observation and feedback to teachers (Relay GSE Instructional Leadership) • Data focus: iReady • Joy • Decrease Chronic absenteeism to below 5% • Decrease suspension and expulsion below 3% • Increase student academic achievement in ELA and math by 5% <p>The Board provided evidence of review and analysis of data to support sound decision-making. Moving forward CSD noted a need to continue to provide updates of systemic reviews of school performance data and other information related to successfully overseeing in a format that addresses <u>each charter individually</u> to be able to track growth and report consistently and independently of each other.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>(G1) 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). Please note the following:</p>	



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- As noted in 2018-2019 the organizational structure has leadership roles that overlap between the Chief Operations Officer and the Executive Administrator, per petition the organization has not been able to fulfill this part of the charter.
- On October 21, 2019, the Youth Policy Institute Charter Schools (YPICS) agendized a change in governance structure with a recommendation to approve updating board By-laws and Articles of Incorporation. The Board's intent is to remove YPI as the sole-statutory member of the YPI Charter Schools, Inc. CSD requests the organization forwards such changes of the documents and approved agendas and minutes once all has been completed to finalize requested Material Revision.

(G3) 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, as evidenced by Binder 1, which included:

- The school's handbook was included and has all required elements, except for process for stakeholder complaints.
- Evidence of the Stakeholder Complaint Procedure needs to also be included as part of the handbook with an update of the following:
 1. The process for General Complaint procedures and the evidence of a flow chart presented in 1.12 does not match.
 2. Under school provides a meaningful opportunity to be heard: the complaint procedures provide a one-step complaint process that goes from resolving complaint informally to file a written complaint with the office to the Executive Director or Chair of the Board.
 3. Under school provides reasonable opportunity for fair appeal: it did not provide enough information but that the complainant may file a written complaint with the office of the Executive Director or Chair of the Board.
 4. Under school provides sufficiently clear advance notice of specific issue/proposed action: the school did not provide enough information.
- Although the school has provided a complaint form for stakeholders, CSD Staff notes a need to:
 1. Provide the form in English/Spanish
 2. Include what the next steps and process will be to ensure that stakeholders are aware of the next steps.

Corrective Action Required

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

Notes:

On the minutes from the YPICS Regular Board Meeting - September 30, 2019, CSD notes as a promising practice the decision to schedule Board Members to oversight visits for all three charter schools, Monseñor Oscar Romero, Bert Corona Middle and Bert Corona High School.

****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.***



LAUSD CHARTER SCHOOLS DIVISION

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

The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:

- Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations
- Evaluation of school’s executive level leadership

	Rubric	Sources of Evidence
Performance	<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 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 checked="" 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"/> Organizational 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"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <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)



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G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

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:

- 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

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



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

<i>The Governing Board has a system in place to ensure ongoing:</i>		
<ul style="list-style-type: none"> 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 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 other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a 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 (e.g., inadequate cash flow, etc.) and/or 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 (e.g., inadequate cash flow, etc.) and/or 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 checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a 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 checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)



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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 a 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



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STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	2
<p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO If yes, what is the school's identification? (See additional information within "Notes" section below) <input type="checkbox"/> Comprehensive Support and Improvement (CSI) <input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u> (A6) The school's percentage of "At Risk" English Learners is 0.0%, which is at a rate lower than the Resident Schools Median at 1.4%. (A8) The school's Four-Year Adjusted Cohort Graduation Rate is 93.2%, which is at a rate higher than Resident Schools Median at 88.9%.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u> (A1) None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019, whereas: • 38.71% of Latino students Met or Exceeded the Standards, a decrease of 6.53 percentage points. • 41.82% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, decrease of 13.74 percentage points. (A2) None of the school's subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019, whereas: • 13.12% of Latino students Met or Exceeded the Standards, a decrease of 0.83 percentage points. • 12.96% of Socioeconomically Disadvantaged students Met or Exceeded the Standards, decrease of 9.26 percentage points. (A3) The schoolwide percentage of students who Met and Exceeded Standards in 11th Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median, whereas Bert Corona High School Students Met or Exceeded the Standard in ELA at 38.09%, compared to the Resident Schools Median at 52.37%. (A4) The schoolwide percentage of students who Met and Exceeded Standards in 11th Grade on the SBAC in Math is at a rate lower than the Resident Schools Median, whereas Bert Corona High School Students Met or Exceeded the Standard in Math at 12.90%, compared to the Resident Schools Median at 17.24%. (A1-A4) The school leadership noted that the 2019-2020 focus is: • Aimed at two new instructional initiatives mandated and prescribed by the Executive Director and Governing Board: Get Better Faster instructional coaching with Relay school leader training, and iReady periodic assessment implementation. • 2018-2019 Updates to the Academic Excellence Action Plan are below:</p>	



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- 1) Monitoring grade distribution at the end of every grading period – for 2019-2020 the 10 weeks grades distribution was completed to plan intervention and reteach lessons.
- 2) Per the leadership team, PD for the Math department was devoted to data dives – for 2019-2020. This has been sharply curved to conduct scope and sequence meetings and data meetings with teachers and coaches.
- 3) Math teachers are reviewing sample SBAC questions and plan to embed them into their lesson. Added beginning February 24, 2020 all 11th graders will be engaged in 9 weeks of SAT preparation at 3 hours per session.
- 4) In ELA the school leadership noted a need to facilitate growth of reading comprehension for students' academic skill.
- 5) The school leadership noted their data dive into iReady has set the course for multiple professional development pathways into learning how to better equip students to become readers for comprehension (See O8, for relevant Professional Development).

(A5) The school reclassifies English Learners at a rate lower than the Resident Schools Median, whereas Bert Corona High School reclassification rate for 2018-2019 is 20.0% compared to Resident Schools Median of 22.4%.

- The school leadership noted that in review of the 2019 Summative ELPAC results, English Learner students' need the most support in the areas of Reading, Listening, and Writing, below are the steps the school noted for support of all At-Risk, LTEL and English Learners:
 - 1) The 8-block schedule for English Learners has been adjusted to include the Success for All. This is a reading program created to support students in reading and writing.
 - 2) All teachers use clarifying, questioning, predicting, summarizing and collaborative group work as part of good teaching when developing lessons and tasks.

(A7) The school's percentage of LTELs is 16.5%, which is at a rate higher than the Resident Schools Median at 10.5% (see A5)

(A9) The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. The school leadership noted that this year has been difficult to reflect on data comparison from beginning of the year to mid-year due to their transition into iReady.

The reading data provided did not include 9th complete numbers. The school leadership did note that the internal assessment results from the beginning of the 2019-2020 school year reveal the need to support students in achieving growth in reading as only 21% started the school year at or above grade level. In math the school provided data of 150 students with missing a group of 40 students. The school leadership is formalizing a plan to move forward in terms of data tool selection, which might include:

- MAPS internal assessments – the school leader noted that MAPS is an appropriate tool for a high school to measure internal assessment data and growth over time.
- iReady which has a pathway to support students that are below grade level.
- Redefining Achieve 3000 -a tool to measure lexile levels.



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

Notes:

YPICS's reclassification criteria are as follows:

- Comparison of performance in basic skills – earning C or better in their grade level English class.
- Assessment of English Proficiency – ELPAC Results, NWEA Maps (*iReady*)
- Teacher evaluation of student academic performance
- Parent opinion and consultation

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



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

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

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

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

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

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

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

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



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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 similar 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) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <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 and 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 similar 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) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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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 2018-2019 (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input checked="" type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input checked="" type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (within “Notes” section above) (B2.4) <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 2018-2019 (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 Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> “At-Risk” by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1)



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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 2018-2019 (CDE) 		
Performance	Rubric	Sources of Evidence
<p>Performance</p>	<input type="checkbox"/> The school’s percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate similar to the Resident Schools Median <input checked="" type="checkbox"/> The school’s percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1)

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Four-Year Adjusted Cohort Graduation Rate (CDE) (high schools only) 		
Performance	Rubric	Sources of Evidence
<p>Performance</p>	<input checked="" type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input checked="" type="checkbox"/> Graduation Requirements (within “Notes” section above (B2.5)) <input type="checkbox"/> Other: (Specify) <hr/> A-G passing grade requirement (e.g. C or D) (CSD internal use only) The passing grade requirement for Bert Corona High is D.



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

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

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

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

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

	Rubric	Sources of Evidence
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 checked="" type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input type="checkbox"/> No assessment of performance for this indicator.	<input checked="" type="checkbox"/> Internal academic performance and progress data and information (B2.2) <input checked="" type="checkbox"/> School Internal Assessment Data Report or equivalent (B2.6) <input type="checkbox"/> Other: (Specify)



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CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS

Summary of School Performance

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

I. Academic Performance

A10: CAASPP ENGLISH LANGUAGE ARTS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Orange

Change Level: Declined

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

Performance Level Color: Orange

Change Level: Maintained

A12: ENGLISH LEARNER PROGRESS

Performance Level Color: Choose an item.

Change Level: Choose an item.

A13: COLLEGE/CAREER (high schools only)

Performance Level Color: Choose an item.

Change Level: Choose an item.

II. Academic Engagement

A14: CHRONIC ABSENTEEISM

Performance Level Color: Choose an item.

Change Level: Choose an item.

A15: GRADUATION RATE

Performance Level Color: Choose an item.

Change Level: Increased

III. Conditions and Climate

A16: SUSPENSION RATE

Performance Level Color: Green

Change Level: Declined

NOTES:



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

N/A



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ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>(O1) 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. Evidence included:</p> <ul style="list-style-type: none"> • Memos from Maclay Middle School noting drills that correlate to those provided on the flier such as September 24, October 17, 2019 and February 27, 2020. • A flier with a list of emergency drills was provided for Fire Drill- September 24, Earthquake Drill-October 17, Shelter in Place-December 17, 2019 and February 7, 2020 Lockdown Drill- February 27, 2020 and Active shooter drill (pending). The school also provided three rosters as evidence of drills for Shakeout Drill, earthquake Drill and Fire Drill. • The school provided a checklist labeled Emergency Accountability Form, where teachers provide student attendance counts. • One a PowerPoint provided as was evidence of an earthquake training. <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 & CA NGSS. The school leadership noted that CCSS are the root of their instructional program and noted that all of their learning outcomes with the exception of CTE Pathway courses and electives are derived from one or more CCSS.</p> <ul style="list-style-type: none"> • The school provided evidence of learning outcomes by class name; each spreadsheet provided noted Common Core being addressed, however note that year of the documentation ranged from 2016 to 2018. • Evidence of Unit Plans and syllabus that included: learning objectives aligned to CCSS, brief descriptions of the unit, rubric (link), types of assessment used to determine proficiency and instructional activities used to address learning outcomes. • Work samples were provided for different subjects such as History, English, Math, Art, and College class. • Evidence via PowerPoint dated August 7, 2019 provide insight into teachers partnering up to unpack the state standards, write learning outcomes, transfer outcomes to a rubric, use outcome bank and CCSS standard to document information, and assess student work samples. Teachers had the opportunity to practice during such PD, and to reflect on choices and evidence of student work. • The leadership team noted that curriculum for Science is developed by teachers following the NGSS standards with supports of textbooks to guide the teachers in the planning. • WASC – the letter provided including a 6 Year Accreditation Status with a Mid-cycle two day visit though June 30, 2026. <p>(O5) The school has substantially implemented the key features of the educational program described in the charter:</p> <ul style="list-style-type: none"> • PBL 	



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Evidence of PBL Design Project Unit Declaration of Independence with driving question, essential questions, standards being covered (Social Studies, Reading, Visual and Performing Arts), Learning Objectives, Process, Final Products, Technology, and accommodations of students with Special needs and different learning styles. Other evidence regarding PBL was presented as one PBL unit for English, government and US History.

- **RUBRIC DESIGN**

The school leadership noted that at the start of 2019-2020 school year, all staff committed to the process of rubric design using exemplars, and to begin instruction daily with exposure to the target learning outcomes for the days lessons (along with accompanying rubrics).

- **MASTERY GRADING**

Although this is an essential area to the key features of the charter- the school has implemented a hard 5-week deadline to encourage students to be responsive and responsible for deadlines. The school has also implemented a mid-term and final within the semester as an additional opportunity to demonstrate mastery that may have not been achieved though formative assessments.

(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:

- Schools self-review checklist was submitted September 27, 2019 as evidenced in binder 3.
- Last DVR certification was conducted in 2017-2018.
- Sped PD included topics such as: social emotional learning, NCI personal space, non-verbal behavior, responding to fights, Special education 101, supporting all students (nine types of curriculum adaptation sheet), and from Charter Operated Programs – supporting students through a trauma informed lens.
- 200 report included 3 overdue triennial
 - 1: due triennial 2/19/2020; one was completed today
 - 2: due triennial 2/12/2020; scheduled for tomorrow
- 300 report included services
 - One in tier 5: the school is developing to continue to provide services for students.
 - One in tier 6: the school is searching for a male provider for counseling. Please contact the COP office if needed support.
- WASC findings - Staff will have continuous training in strategies to instruct and accommodate students with learning disabilities to increases access to the curriculum. Getting Better/Model is a goal for the organization to provide feedback during observations. The leadership at the executive level continues to try to provide coaching and support for teachers.

(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. Evidence of professional development via binder 3 included topics such as:

- Get Better Faster (scope and sequence)
- Rigor in instructional program
- Calibration of assessment/Data analysis for content comprehension
- Youth truth climate and culture data analysis
- Student-led conference facilitation
- Get Better Faster (see it, name it, do it)
- Reading comprehension –Marzano’s 6 steps to teaching vocabulary –



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- PBIS – HS implementation
- Standards Based Grades Distribution analysis
- Assessing college readiness indicators in BCCHS instructional practice
- SDAIE strategies
- Reading comprehension – expository text structure an during the high 5
- Achieve 300 use and implementation in the CCSS driven classroom
- Seizure response
- Meal service implementation.

Some of the findings noted from the WASC’s self-study include:

- BCCHS will make reading strategies for EL students the focus of 2019-2020 professional development meetings: Data Dive into iReady, 5 Essential components of reading instruction, comprehensible input and teaching reading to ELL, SDAIE, SFA strategies, Achieve 3000, Effective note taking from informational text, writing to improve reading, and EL mentor teachers.
- Differentiated professional development.
- Training for faculty on Standards Based Grading, mastery learning and authentic assessment.
- Staff will be trained in SFA, the primary reading support program.
- Staff will be trained to use Achieve 300 for assisting students with reading comprehension.

Per conversation with one lead teacher at the school it was noted that the professional development should be more focused, he noted: “Having professional development about something specific that is on the moment, can take us away from sticking to the specific path.”

(O9) The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns.

- School Site Council agenda includes items such as LCAP 2019-2020, college updates, WASC visit and Budget update.
- Calendar provide includes events such as: Back to School Night (August 27, 2019), Pan con Café (parent meeting September 11, 2019; October 22, 2019; November 19, 2019; January 23, 2020), Parent Athletic Meeting (September 5, 2019), Fall Parent conferences (October 18, 2019) and Parent Info Night.
- Workshops for parents every Thursday with different topics such as, depression, anxiety, alcohol and drugs.
- Evidence of human trafficking prevention resource for grades 6-12 AB1104 conducted on September 11, 2019 as part of the Pan con Café meeting.

(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. The school provides on their website:

- Access to 5 different hath providers.
- A link to the schools Suicide Prevention Policy



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- Access to counseling services and referral to Luminarias on campus.
- Stakeholder complaint procedures (see G3 for updates)
- The school leadership has noted that the primary communication with parents for the 2019-2020 school year has been through “Remind” which informs parents of important updates.

(O12) 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. CSD noted the following:

- One teacher with pending evaluation of the EL Authorization submitted 2/6/2020 – CSD observed the teacher and (for compliance purposes) a substitute teacher in the classroom as well.
- Three vendor certification forms needed updates to credentialing or TB. Please provide an update to the CSD.

Areas Noted for Further Growth and/or Improvement

(O1) During the conversation with the leadership team it was noted the following areas for growth and improvement for (O1):

- School Safety Plan provided does not include any members from Bert Corona high School.
- Trainings: ensure that there is evidence of other trainings for faculty and students beyond earthquake.

(O3) The school leadership noted that they are still working through addressing the ELD standards as part of the curriculum during the SFA period.

(O4) 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.

- The school leadership noted that they no longer double-block for math and ELA. Students have 2 blocks only for credit recovery purposes or with the intent of accelerating their high school credit acquisition.
- The school continues to use the SFA period for designated ELD time, and the use of SDAIE scaffolding strategies to support EL and LTEL, however there is limited evidence provided to reflect the exposure to ELD standards as part of the curriculum (this was also noted in the 2017-2018 annual oversight report).
- Some of the findings noted from WASC’s self-study include:
 - The school will use iReady Diagnostic Assessments as common-core correlated measurement tools to inform instruction.
 - The school will use Achieve 300 as an adaptive intervention tool in the explicit instruction of reading informational text.

(O7) 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:

- The school’s suspension rate for 2018-2019 is 4.1%. The school has noted that Culture and climate at BCCHS is still in its early stages. The school has noted the following:
 - A process for referrals that includes having conversations with students and communicate and inform parents when there is a problem.
 - Counseling services, the school refers students to Luminarias counseling on campus.



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- Parent Meetings – to discuss student concerns such as absences or tardies.
- Scholar dollar incentives.
- On FIRE Awards during monthly assemblies to continue to celebrate students who demonstrate such behaviors of being: Focus, Intentional, Reflective, and Engaged.
- Evidence on binder 3 included: athletic grade check, behavior matrix, discipline referral, ODR tracker, detention form, disciplinary code letter, FIRE poster ideas, a student travel card and scholar athlete contract.
- Evidence of implementation of AB 2291 (procedures for preventing acts of bullying, including cyberbullying) – evidence provided included a PowerPoint labeled Welcome Back Knights, where there are guidelines for preventing acts of bullying, however the presentation did not include cyberbullying as an area of prevention.
- Some of the findings noted from WASC’s self-study include:
 - The school needs to develop a clear, detailed posted consequence chain for expectations for repeated negative behaviors – the school provided a Behavior Growth Path for undesirable and desirable choices. Continue to provide evidence of trainings aligned to expectations of behaviors for students and staff.
 - School needs to train all staff in restorative justice practices to build self-regulation behavior – PBIS has been the first year to implement and collect data, Office Direct Referrals are being collected to be addressed and to provide support.

(O9) Areas for growth in this indicator include:

- See G3 regarding the need to address General Complaint procedures.
- Uniform Complaint Procedure on the UCP form online still names Yolanda Fuentes as Executive Administrator – change titles or designee’s name.

(O11) 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. The school leadership noted that the evaluation system put in place this year is called Whetstone and is directly linked to Get Better Faster scope and sequence of indicators of effective classroom instruction. It provides opportunities for quick feedback and longer observations that lead to re-teaching practice and implementation of focused pedagogy and strategies. This area is a work in progress.

Corrective Action Required

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



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Notes:
None

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



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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
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 (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f) <input type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> (“ESSA Grid”) (B3A.1) <input checked="" type="checkbox"/> Site/classroom observation <input type="checkbox"/> Visitor’s Policy (B3.1a) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

The school has a system in place to ensure that:

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a) <input checked="" type="checkbox"/> Evidence of student immunization (B3.2b) <input checked="" type="checkbox"/> Evidence of health screening (B3.2b) <input checked="" type="checkbox"/> Evidence of Epi-pen (B3.2c) <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <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

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), and the California Next Generation Science Standards (CA NGSS) that are applicable to the grade levels served
- 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 & CA NGSS <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 & CA NGSS <input type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> Evidence of implementation of CA NGSS (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3.3c) <i>*new schools only</i> <input checked="" type="checkbox"/> WASC documentation (B3.3d) <input checked="" type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3.3i) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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

The school:

- 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 standards-based instruction, progress monitoring, assessment, and reclassification)
- Has appointed a designee to assist and support foster youth

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.3j) <input checked="" type="checkbox"/> Implementation of the school’s English Learner Master Plan (B3.3j) <input checked="" type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <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
<p>Performance</p> <p><input type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter</p> <p><input checked="" type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter</p> <p><input type="checkbox"/> The school has partially implemented the key features of the educational program described in the charter</p> <p><input type="checkbox"/> The school has minimally implemented, or not at all, the key features of the educational program described in the charter</p>	<p><input checked="" type="checkbox"/> Professional development documentation (B3.4b)</p> <p><input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3.3k)</p> <p><input checked="" type="checkbox"/> Classroom observation</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>

O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6

<i>The school has a system in place to ensure that the school:</i>	
Rubric	Sources of Evidence
<ul style="list-style-type: none"> • 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 	
<p>Performance</p> <p><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</p> <p><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</p> <p><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</p> <p><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</p>	<p><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10)</p> <p><input checked="" type="checkbox"/> Professional development documentation (B3.4b)</p> <p><input type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j)</p> <p><input checked="" type="checkbox"/> Self-Review Checklist (B3.4a)</p> <p><input checked="" type="checkbox"/> Other special education documentation (B3.4a)</p> <p><input checked="" type="checkbox"/> Consultation with Charter Operated Programs office</p> <p><input checked="" type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education (B3.4a)</p> <p><input checked="" type="checkbox"/> Classroom observation</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input 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 checked="" 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <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 (B3.4c) <input type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3.4c) <input checked="" type="checkbox"/> Evidence of data monitoring (B3.4c) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, and disproportionality (B2.1) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates <input checked="" type="checkbox"/> Evidence of implementation of AB 2291 (B3.4c) <input checked="" type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

The school:			
<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	<table border="1"> <tr> <td style="vertical-align: top;"> <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 </td> <td style="vertical-align: top;"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table>	<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 (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
<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 (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input checked="" 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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <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 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <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 (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school’s approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) grades 6-12 (B3.4d) <input checked="" type="checkbox"/> Interview of stakeholders <input 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
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year

**required on website

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



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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 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 checked="" type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Documentation related to a system for evaluation of staff and administrator(s) (B3.4f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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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 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 checked="" type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <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



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7598	2016-2017					2017-2018					2018-2019				
Bert Corona Charter High	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		26,907	33,311	81,025	81,026		136,475	134,606	178,481	178,482		0	215,218	201,140	201,140
Current Assets		315,086	326,905	609,069	609,070		437,861	443,691	498,232	496,858		0	509,862	639,558	639,558
Fixed and Other Assets		76,053	76,053	77,383	77,383		57,183	57,183	57,183	58,558		0	43,925	221,536	221,535
Total Assets		391,138	402,957	686,451	686,453		495,044	500,874	555,415	555,416		0	553,787	861,093	861,093
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		64,471	117,301	286,750	289,442		144,060	151,154	149,058	159,339		0	195,217	428,699	448,499
Other Long Term Liabilities		157,441	107,441	102,695	100,004		52,695	52,695	60,283	50,004		0	10,279	0	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		221,912	224,742	389,445	389,446		196,756	203,849	209,341	209,343		0	205,496	428,699	448,499
Net Assets		169,226	178,215	297,006	297,007		298,288	297,025	346,074	346,073		346,379	348,291	432,394	412,594
Total Revenues	2,120,318	2,018,593	1,992,987	2,031,277	2,031,277	3,144,959	2,664,932	2,685,552	2,714,290	2,762,147	3,749,614	3,362,102	3,262,783	3,495,366	3,495,368
Total Expenditures	2,080,176	2,001,372	1,966,780	1,886,279	1,886,278	3,050,429	2,663,648	2,685,535	2,665,222	2,665,222	3,674,914	3,361,797	3,260,565	3,409,043	3,428,847
Net Income / (Loss)	40,142	17,220	26,207	144,998	144,999	94,531	1,284	18	49,068	96,925	74,700	305	2,218	86,323	66,521
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	40,142	17,220	26,207	144,998	144,999	94,531	1,284	18	49,068	96,925	74,700	305	2,218	86,323	66,521
Net Assets, Beginning	121,041	152,006	152,006	152,006	152,008	178,215	297,004	297,004	297,006	297,007	323,219	346,074	346,073	346,073	346,073
Adj. for restatement / Prior Yr Adj	0	0	2	2	0	0	0	3	0	(47,859)	0	0	0	(2)	0
Net Assets, Beginning, Adjusted	121,041	152,006	152,008	152,008	152,008	178,215	297,004	297,007	297,006	249,148	323,219	346,074	346,073	346,071	346,073
Net Assets, End	161,183	169,226	178,215	297,006	297,007	272,745	298,288	297,025	346,074	346,073	397,919	346,379	348,291	432,394	412,594

7598	Audited Financials					2019-2020				
Bert Corona Charter High	2015-16	2016-17	2017-18	2018-19	2019-20	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	70,647	81,026	178,482	201,140	0		181,593	0	0	0
Current Assets	406,914	609,070	496,858	639,558	0		482,200	0	0	0
Fixed and Other Assets	67,904	77,383	58,558	221,535	0		161,824	0	0	0
Total Assets	474,818	686,453	555,416	861,093	0		644,024	0	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	172,810	289,442	159,339	448,499	0		137,799	0	0	0
Other Long Term Liabilities	150,000	100,004	50,004	0	0		55,351	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	322,810	389,446	209,343	448,499	0		193,150	0	0	0
Net Assets	152,008	297,007	346,073	412,594	0		450,874	0	0	0
Total Revenues	1,561,639	2,031,277	2,762,147	3,495,368	0	3,219,097	2,768,201	0	0	0
Total Expenditures	1,396,646	1,886,278	2,665,222	3,428,847	0	3,206,935	2,749,722	0	0	0
Net Income / (Loss)	164,993	144,999	96,925	66,521	0	12,162	18,479	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	164,993	144,999	96,925	66,521	0	12,162	18,479	0	0	0
Net Assets, Beginning	(12,985)	152,008	297,007	346,073	0	348,291	432,394	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	(47,859)	0	0	(1,276)	0	0	0	0
Net Assets, Beginning, Adjusted	(12,985)	152,008	249,148	346,073	0	347,015	432,394	0	0	0
Net Assets, End	152,008	297,007	346,073	412,594	0	359,177	450,874	0	0	0



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/19/2020

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> <p>Bert Corona Charter High School’s fiscal condition is positive and has been upward trending since the 2015-2016 fiscal year. According to the 2018-2019 independent audit report, the school had positive net assets of \$412,594 and net income of \$66,521. The 2019-2020 First Interim projects positive net assets of \$431,073 and net income of \$18,479.</p> <p>According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2019, Bert Corona Charter High School is one of three schools operated by YPICS, all of which are currently authorized by the Los Angeles Unified School District (LAUSD). YPICS’ fiscal condition is strong. YPICS and its charter schools reported positive net assets of \$26,830,748 and net income of \$6,146,518. YPICS, without its charter schools, reported positive net assets of \$365 and net income of \$0. According to YPICS, there are no management fees charged to Bert Corona Charter High School or the other charter schools that it operates. Instead, each school pays a portion of the actual expenses for shared costs and administrative services that are related to the organization as a whole. These costs are allocated between the schools based on Average Daily Attendance (ADA) for each school.</p> <p>Areas of Demonstrated Strength and/or Progress:</p> <p>1. The school’s fiscal condition is positive.</p>		3																														
	<table border="1"> <thead> <tr> <th></th> <th>2015-2016 (Audited Actuals)</th> <th>2016-2017 (Audited Actuals)</th> <th>2017-2018 (Audited Actuals)</th> <th>2018-2019 (Audited Actuals)</th> <th>2019-2020 (First Interim)</th> </tr> </thead> <tbody> <tr> <td>Net Assets</td> <td>\$152,008</td> <td>\$297,007</td> <td>\$346,073</td> <td>\$412,594</td> <td>\$431,073</td> </tr> <tr> <td>Net Income/Loss</td> <td>\$164,993</td> <td>\$144,999</td> <td>\$49,066</td> <td>\$66,521</td> <td>\$18,479</td> </tr> <tr> <td>Transfers In/Out</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> </tr> <tr> <td>Prior Year Adjustment(s)</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> <td>\$0</td> </tr> </tbody> </table>		2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (First Interim)	Net Assets	\$152,008	\$297,007	\$346,073	\$412,594	\$431,073	Net Income/Loss	\$164,993	\$144,999	\$49,066	\$66,521	\$18,479	Transfers In/Out	\$0	\$0	\$0	\$0	\$0	Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0	
	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (First Interim)																											
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LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 2/19/2020**Areas Noted for Further Growth and/or Improvement:**

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

1. Untimely Bank Deposits:

Based on the CSD's review of the school's bank statements for the period from April 2019 through September 2019, the CSD noted two deposits that were made late. Details regarding these deposits are provided below.

Item #	Acct # Ending in	Date Funds Collected	Date Funds Deposited	Number of Days Late	Deposit Amount
1	X0661	6/7/2019	6/24/2019	2	\$2,060.00
2	X0661	6/24/2019	7/8/2019	1	\$3,411.00
TOTAL					\$5,471.00

Page 7 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "Deposits will be made within ten business days."

The school informed the CSD that the school's leadership team would discuss this policy with its staff, to ensure that all funds collected are deposited in a timely manner. The school further stated that training on the school's fiscal policies and procedures was provided to all staff in January 2020, and weekly reminders would be sent to all designated depositors to ensure that all future deposits are made timely.

The CSD recommends that the school officials with responsibility for reviewing and approval all deposits (including the Chief Operations Officer, the Executive Administrator/Assistant Executive Administrator, or the authorized designee), ensure that all funds collected are deposited timely and appropriate controls are established, to prevent school funds from being deposited late in the future.

2. Lack of Documented Approvals of Bank Reconciliation Reports:

Based on the CSD's review of a sample of the school's Bank Reconciliation Reports for the period from April 2019 through September 2019, the CSD noted that the August 2019 Bank Reconciliation Report for the Checking Account Ending in X7817 lacked documented evidence of approval.



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Page 2 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Accounting Manager or Vice President, School Finance assigned to the organization will review and approve the bank reconciliation by initialing and dating the report.”

According to the school’s back office services provider firm, all of the school’s Bank Reconciliation Reports are prepared and approved electronically, and its financial software does not permit the completion of the next bank reconciliation cycle until the current Bank Reconciliation Report has been approved.

The CSD recommends that the school consistently prepare and approve all Bank Reconciliation Reports in the manner outlined in its fiscal policies and procedures, and ensure that all future Bank Reconciliation Reports are prepared accurately, reviewed and approved in a timely manner, and include the appropriate signatures (including the printed names and titles/positions), as well as the preparation and review/approval dates, to validate the review and approval processes performed by the school.

3. Checks Outstanding for 90 Days or More:

Based on the CSD’s review of the school’s Bank Reconciliation Reports, the CSD noted an employee reimbursement check that, as of September 30, 2019, had been outstanding for more than 90 days (Check # 307101, in the amount of \$32.82, dated 6/7/2019).

The school stated that the check referenced above was researched and investigated before it was voided and reissued.

The CSD recommends that the school update its fiscal policies and procedures, to provide guidance and establish expectations for its staff regarding the research, investigation, write-off, and reissuance of checks that have been outstanding for specified periods of time.

4. Lack of Documented Pre-Approval for Travel Expenses:

Based on the CSD’s review of the school’s credit card statements and 40 sample transactions for the period spanning the period from April 2019 through September 2019, the CSD noted two travel-related charges that lacked evidence of pre-approval from the school’s Executive Director. Details regarding these transactions are provided below.

Item #	Acct # Ending in	Transaction Date	Vendor Name	Amount	Transaction Description
1	X0194	4/9/2019	Airbnb	\$471.92	Room accommodations for State speech and debate competition
2	X0194	4/16/2019	Airbnb	\$214.83	Lodging for college trip to UC Merced and SFSU
TOTAL				\$686.75	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: “The Executive Director must pre-approve all school related travel.”



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According to the school, all school-related travel plans are discussed and approved during the school's leadership team check-in meetings.

The CSD recommends that the school's governing board require the school's leadership team to establish more stringent controls in this area and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.

5. Lack of Documented Pre-Approvals for Employee Reimbursements:

Based on the CSD's review of the school's check register for the period from November 2018 through October 2019, a sample of 55 transactions were selected for further review. The CSD noted three employee reimbursements that lacked evidence of pre-approval from either the school's Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. The reimbursements in question are summarized below.

Item #	Reimbursement Check Issuance Date	Check #	Payee	Reimbursement Check Amount	Transaction Description
1	11/16/2018	306352	School Employee	\$82.01	Parent conference breakfast
2	12/6/2018	306422	School Employee	\$91.93	Food for MORCS DVR
3	5/10/2019	307002	School Employee	\$74.00	ORO Tel Inc. – Live Scan
TOTAL				\$247.94	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "An employee or school volunteer seeking to make a school-related purchase must obtain pre-approval from the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator."

During the CSD's fiscal review of the school in the previous year (2018-2019), the CSD noted six employee reimbursements that lacked evidence of pre-approvals from the school's Executive Director, its Chief Operations Officer, or its the Executive Administrator and, in response, the school advised the CSD that the school's leadership team would develop a Pre-Approval Form to ensure that all future pre-approvals of employee reimbursements were documented.

However, during the current year's fiscal review (2019-2020), the school informed the CSD that the Pre-Approval Form referenced by the school in 2018-2019 was not actually implemented in 2019-2020 (because the school considers the Form cumbersome). The school further advised the CSD during the 2019-2020 fiscal review that, instead of implementing this Pre-Approval Form, the school intends to revise its fiscal policies and procedures and will propose an acceptable method of employee reimbursement pre-approval to its governing board for consideration (which, according to the school, could include some form of email approval or other documentation).

The CSD recommends that the school's governing board require the school's leadership team to establish more stringent controls in this area, and ensure adherence to the pre-approval processes outlined in the governing board-approved fiscal policies and procedures.



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DATE OF VISIT: 2/19/2020**6. Lack of Documented Approval for Purchase Requisitions/Purchase Orders:**

Based on the CSD's review and analysis of supporting documents provided by the school, the CSD noted a vendor payment that was not supported by a purchase order reflecting documented approval from either the school's Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. Details regarding the vendor payment in question are provided below.

Check #	Check Issuance Date	Vendor	Description	Amount	CSD's Comments
307440	8/29/2019	Lakeshore Learning Materials	Classroom supplies - BCCS	\$282.26	Purchase order not signed/approved
			Classroom supplies - BCCHS	\$801.19	
			Classroom supplies - MORCS	\$908.86	
TOTAL				\$1,992.31	

Page 14 of the 9/30/2019 YPICS Fiscal Policies and Procedures states: "All purchases over \$500 require a purchase requisition. The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator will approve the purchase requisition after determining:

- If the expenditure is budgeted.
- If funds are available for the expenditure.
- If the expenditure is allowable under the appropriate revenue source.
- If the expenditure is appropriate and consistent with the vision, approved charter, school policies and procedures and any related laws or applicable regulations.
- If the price is competitive and prudent and proper bidding procedures have been followed."

According to the school, its leadership team will review all of the school's purchase orders and purchase requisitions and ensure that the appropriate approvals are documented therein.

The CSD recommends that the school strictly adhere to its governing board-approved fiscal policies and procedures to ensure that complete supporting documents are submitted and appropriate approvals are obtained for all applicable transactions, including purchase orders.

7. Bank Service Fees and Charges on Student Body and Parent Accounts:

Based on the CSD's review of the school's bank statements, the CSD noted the following bank fees and charges:



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Item #	Acct # Ending in	Statement Closing Date	Transaction Amount	Transaction Description
1	X7817	4/30/2019	\$12.00	Monthly Service Fee
2	X7817	5/31/2019	\$12.00	Monthly Service Fee
3	X0299	7/31/2019	\$24.80	Analysis Service Charge: Returned Deposited Items (\$14.00) and Branch Coin/Currency Services (\$10.80)
4	X0552	7/31/2019	\$0.30	Analysis Service Charge: Branch Coin/Currency Services
5	X0661	7/31/2019	\$22.01	Cash Deposit Immediate: Excess Cash Deposits
6	X0299	8/31/2019	\$29.70	Analysis Service Charge: Branch Coin/Currency Services
7	X0299	9/30/2019	\$12.90	Analysis Service Charge: Branch Coin/Currency Services
TOTAL			\$113.71	

The CSD was informed that the school's leadership team is considering changing financial institutions for its Student Body and Parent bank accounts.

The CSD recommends that the school regularly review all of its bank statements, note all assessed service fees or charges, and consider alternatives for eliminating or reducing such charges.

8. Penalties Incurred for Late Retirement Contribution Payments to California State Teachers' Retirement System (CalSTRS):

Based on the CSD's review of the school's check register, a CalSTRS contribution payment was selected for further review. The CSD noted that the supporting documents provided for this payment, which was made on or about 1/31/2019 (in the amount of \$93,221.95, payable to the Los Angeles County Office of Education—in reference to the school's November 2018 contribution), included a delinquency penalty of \$34.18.

According to the Los Angeles County Office of Education, delinquency penalties are assessed when mandatory CalSTRS contribution payments are made later than the specified payment periods (pursuant to the California Education Code).

According to the school, its CalSTRS contribution payments are challenging for it to manage, due to unforeseen factors that may require subsequent changes to its calculations (such as part-time employee hours, staff changes, policy changes, etc.).

The CSD recommends that the school's Executive Director, who bears the responsibility for all operations and activities related to financial management, ensure that all retirement data and payment contributions are reported accurately and timely, to prevent the school from incurring additional retirement contribution delinquency penalties in the future.



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DATE OF VISIT: 2/19/2020

9. Vendor Payments Issued Reflecting Information Inconsistent with Revised Organizational Structure:

Based on the CSD’s review of documents provided by the school, the CSD noted a vendor payment that was supported by a lease agreement between the San Fernando Valley Japanese American Community Center and Youth Policy Institute [YPI] (Check # 307500, in the amount of \$9,500, dated 9/26/2019, which indicated that the check was for a 10/2019 Rent Payment). The CSD was informed that YPI, a former sole member of YPICS, had been removed from this sole member role—effective November 6, 2019, per YPICS’ Restated Articles of Incorporation, which, if accurate, potentially nullifies the lease agreement referenced above.

According to the school, the original lease was executed in 2005, and the terms were subsequently extended through June 30, 2021. Currently, YPICS is in the process of negotiating its next lease, which, upon completion, will reference YPICS as the lessee.

The CSD recommends that the school’s governing board and leadership team ensure that all payments made by the school originate from contracts executed either by the school itself or its charter operator. Further, the CSD recommends that the school’s governing board ensure that all service contracts are current, appropriately reviewed, and approved.

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

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

1. Organizational Decision to Forego Public Posting of the School’s Audited Financial Statements:

Bert Corona Charter does not post its audited financial statements to the school’s website. According to the school, a draft version of the school’s annual independent audit report is included with the school’s governing board meeting materials and is available online for public viewing as this item is raised for discussion during the governing board meeting. The school further states that, during other school events held throughout the year, parents and members of the community have the opportunity to obtain details regarding the school’s budget and its related financial information. In addition, the school advised the CSD that stakeholders may also obtain information regarding the school’s finances (including copies of the school’s audited financial statements), via the school’s Main Office. The CSD was provided with a copy of the school’s “Charter Transparency Request Form.”

In order to ease the burden for all stakeholders and members of the public that have an interest in the school’s finances (and demonstrate greater transparency), the CSD recommends that Bert Corona Charter post its current and future audited financial statements on its website.



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DATE OF VISIT: 2/19/2020

2. Inadequate Controls Regarding Intraorganizational Fund Transfers:

Based on the CSD’s review of supporting documents provided by the school, the CSD noted two checks related to intraorganizational fund transfers between bank accounts managed by YPICS (one check issued to Bert Corona Charter School, and one check issued to YPICS). Details regarding these transactions are summarized below.

Item #	Acct # Ending in	Check #	Payee	Amount	Description
1	X3232	1003858	Bert Corona Charter School	\$1,000,000.00	Transfer funds from WF TO PWB
2	X6905	306432	YPI Charter Schools, Inc.	\$100,000.00	Transfer funds from PWB TO CCU
TOTAL				\$1,100,000.00	

The two transfers summarized above include supporting documentation (from either the school’s Executive Director or its back office services provider firm— i.e., copies of canceled checks, bank statements, and/or email requests), and indicate approval from the school’s Executive Director. According to the school, its back office services provider firm monitors the school’s cash accounts and, on a weekly basis, transmits a Cash Position Report that shows each account’s current balance, all outstanding checks, and any other open items. The school further stated that this Cash Position Report is used as a tool to recommend intraorganizational fund transfers as needed. According to the school, no formal approval process exists for these transfers.

Based on the CSD’s review of YPICS’ current fiscal policies and procedures, the CSD noted a lack of written guidance regarding intraorganizational fund transfer requests and approvals, such as: (1) The individuals authorized to request transfers; (2) Permissible purposes for transfers; (3) The required documents to be included with transfer requests submitted for review, and (4) The name(s) and position/title(s) of the parties responsible for reviewing and approving such transfers.

The CSD recommends that YPICS revise its fiscal policies and procedures to incorporate guidelines that sufficiently outline the requirements governing intraorganizational fund transfers, including protocols specifying the individuals authorized to request and review potential transfers, permissible purposes for transfers, and the required supporting documentation for transfers, to establish appropriate controls and enhance transparency.

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

Corrective Action Required:

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



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1. Reviewed independent audit report for the fiscal year ended June 30, 2019 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: None Reported
2. Reviewed bank statements and bank reconciliations from April 2019 through September 2019. Selected the months of June 2019 and July 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Wells Fargo Bank Business Checking Account Ending in X3232 (Operating Account, Bert Corona Charter)
 - b. US Bank Business Checking Account Ending in X0299 (Parent Account, Bert Corona Charter)
 - c. US Bank Business Checking Account Ending in X0552 (Student Body Account, Bert Corona Charter)
 - d. Pacific Western Bank Checking Account Ending in X6905 (Operating Account, Bert Corona Charter)
 - e. Pacific Western Bank Checking Account Ending in X7309 (Operating Account, Monseñor Oscar Romero Charter)
 - f. Pacific Western Bank Checking Account Ending in X7468 (Operating Account, Bert Corona Charter High)
 - g. Pacific Western Bank Checking Account Ending in X3491 (Construction Account, Monseñor Oscar Romero Charter)
 - h. Chase Bank Business Checking Account Ending in X0661 (Parent Account, Monseñor Oscar Romero Charter)
 - i. Chase Bank Business Checking Account Ending in X7817 (Student Body Account, Monseñor Oscar Romero Charter)
 - j. California Credit Union Business Checking Account Ending in X5561 (Operating Account, Bert Corona Charter)
3. Reviewed credit card statements from April 2019 through September 2019. Selected the months of April 2019 and August 2019 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. California Credit Union Credit Card Ending in X0005 (Chief Operations Officer)
 - b. California Credit Union Credit Card Ending in X0013 (Executive Director)
 - c. California Credit Union Credit Card Ending in X0178 (Coordinator of Operations, Monseñor Oscar Romero Charter)
 - d. California Credit Union Credit Card Ending in X0194 (Assistant Executive Administrator, Bert Corona Charter High)
 - e. California Credit Union Credit Card Ending in X0251 (Executive Administrator, Monseñor Oscar Romero Charter)
 - f. California Credit Union Credit Card Ending in X0269 (Coordinator of Operations, Bert Corona Charter High)
 - g. California Credit Union Credit Card Ending in X0277 (Director of Operations, Bert Corona Charter)
 - h. California Credit Union Credit Card Ending in X0285 (Director of Technology)
 - i. Wells Fargo Bank Credit Card Ending in X4736 (Executive Director, account closed in April 2019)
4. Reviewed the following 55 checks (and 10 electronic debit transactions. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Check numbers: 1003858; 1115; 1133; 1150; 1156; 1165; 01/31/19 – STRS; 306308; 306310; 306352; 306422; 306432; 306712; 306716; 306719; 306724; 306728; 306793; 306876; 306956; 306962; 307001; 307002; 307015; 307087; 307109; 307116; 307185; 307236; 307243; 307257; 307263; 307282; 307312; 307323; 307388; 307429; 307440; 307454; 307466; 307467; 307500; 307502; 307511; 307518; 307522; 307549; 307551; 307552; 307584; 307589; 307599; 307602; 307613; Q802580
 - b. ACH Debit Transactions (Checking Account Ending in X6905 – transaction dates): 6/3/2019; 6/6/2019; 6/11/2019; 6/12/2019; 6/13/2019; 6/24/2019; 7/1/2019; 7/3/2019; 7/5/2019; 7/9/2019



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SCHOOL NAME: Bert Corona Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 2/19/2020

5. Per the 2018-2019 audit report, the school's cash and cash equivalents is \$201,140, and total expenditures equal \$3,428,847. Therefore, the school's cash reserve level is 5.87%, 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. A Segregation of Duties (SOD) review was conducted at Monseñor Oscar Romero Charter. No discrepancies were noted.
8. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
9. Pursuant to AB 1871, a signed written statement that indicates that Bert Corona Charter High School is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
10. Bert Corona Charter High School did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
11. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
12. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
13. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
14. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
15. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
16. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
17. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
18. Evidence of Bert Corona Charter High School offering STRS, PERS, a 403(b) Tax-Sheltered Annuity Plan, and/or Social Security benefits to its employees and proof of payment was provided.
19. Equipment inventory was provided.
20. The 2019-2020 LCAP was submitted to LAUSD.
21. The most current LCAP is posted on the charter school's website.
22. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school's website.
23. The most current Audited Financial Statements are not posted on the charter school's website. The CSD's observations were noted in the Other Observations section above.
24. The 2018-2019 audited and unaudited actuals nearly mirror each other.

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

N/A



LAUSD CHARTER SCHOOLS DIVISION

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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 cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<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 cash balance at the beginning of the school year is positive; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



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<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>
<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s). 	<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no significant recurring issues; and 17. Audited and unaudited actuals nearly mirror each other.
<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 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 	<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



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<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>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

<p><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. The cash balance at the beginning of the school year is positive; 3. 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. Governing board adopts the annual budget; 6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871)); 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 	<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>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter High

Annual Performance-Based Oversight Visit Report

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

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

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

SUPPLEMENTAL CRITERIA

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

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

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 2/19/2020

<p><i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i></p>	<p><i>A new school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>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. The cash balance at the beginning of the school year is positive; 3. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement; 4. Projected debt is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school; 5. 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 6. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes; 7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 8. The most current governing board-approved LCAP are posted on the charter school’s website; and 9. The LCAP is submitted to the appropriate agencies. <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>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>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Bert Corona Charter High

Annual Performance-Based Oversight Visit Report

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

Coversheet

YPICS April 2020 Financials

Section: V. Items Scheduled For Action
Item: E. YPICS April 2020 Financials
Purpose: Vote
Submitted by:
Related Material: 19-20 YPICS Board Financial Packet 20-04.pdf

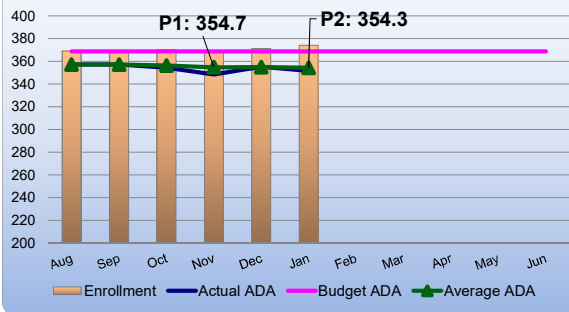
1 Key Performance Indicators

ADA vs. Budget ● Cash on Hand ●
 Net Income / (Loss) ● Year-End Cash ●

KEY POINTS

- P2 ADA was 354.27 with ending enrollment of 374 students.
- Revenue is below budget by \$279K mainly due to lower than budgeted enrollment, reduction in SB740 Reimbursements, and reduction to the meal program due to the school closure
- Expenses are lower than budget by \$240K mainly due to savings in salaries, depreciation costs and reduction to the meal program due to the school closure
- Overall, we are projecting a net loss of \$39K which is \$39K below budget.
- Cash on hand at June 30th is \$1.4M which represents 19.3% of total expense.

2 ADA & Enrollment



3 Average Daily Attendance Analysis

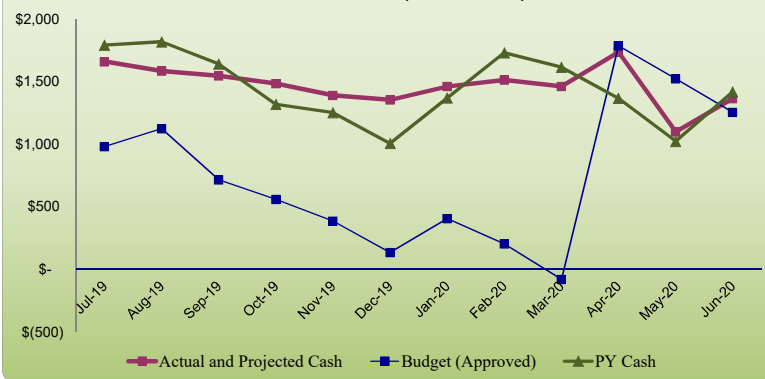
Category	Actual through Month 6	Forecasted P2	Budgeted P2	Better/ (Worse)	Prior Month Forecast	Prior Year P2
Enrollment	374	374	382	(8)	374	375
ADA %	95.8%	96.0%	97.0%	-1.0%	94.7%	96.5%
Average ADA	354.27	354.27	368.63	(14.36)	354.27	365.43

4 LCFF Supplemental & Concentration Grant Factors

Category	Budget	Forecast	Variance	Prior Year
Unduplicated Pupil %	80.9%	81.4%	0.5%	80.8%
3-Year Average %	82.8%	83.0%	0.2%	84.7%
District UPP C. Grant Cap	85.5%	85.5%	0.0%	83.5%

INCOME STATEMENT	Forecast	VS. Budget		VS. Last Month		FY 19-20 YTD			Historical	
	As of 04/30/20	FY 19-20 Budget	Variance B/(W)	Prior Month FC	Variance B/(W)	Actual YTD	Budget YTD	Variance B/(W)	FY 18-19	FY 17-18
Local Control Funding Formula	3,683,607	3,829,337	(145,730)	3,683,607	0	2,890,566	2,903,684	(13,118)	3,710,179	3,347,669
Federal Revenue	2,932,832	3,026,934	(94,101)	2,933,402	(570)	715,694	2,174,430	(1,458,736)	3,312,201	4,064,308
State Revenue	347,525	442,189	(94,664)	347,553	(28)	287,093	271,254	15,838	761,842	714,743
Other Local Revenue	263,749	276,942	(13,194)	257,925	5,824	233,048	186,206	46,841	307,896	399,279
Grants/Fundraising	78,500	10,000	68,500	66,500	12,000	36,500	3,999	32,501	12,301	7,552
TOTAL REVENUE	7,306,213	7,585,402	(279,189)	7,288,987	17,226	4,162,901	5,539,573	(1,376,673)	8,104,418	8,533,552
Total per ADA	20,623	20,577	46	20,575	49				22,178	23,926
w/o Grants/Fundraising	20,402	20,550	(148)	20,387	15				22,144	23,904
Certificated Salaries	1,205,153	1,314,092	108,939	1,208,275	3,122	992,656	1,073,875	81,219	1,156,495	1,168,474
Classified Salaries	919,761	789,648	(130,114)	929,814	10,053	795,772	660,026	(135,746)	843,782	719,824
Benefits	657,642	620,232	(37,409)	653,208	(4,433)	583,330	516,932	(66,398)	591,941	666,768
Student Supplies	618,433	743,145	124,713	618,347	(86)	407,900	615,883	207,983	703,993	679,070
Operating Expenses	3,677,241	3,782,949	105,708	3,662,023	(15,218)	1,963,107	3,158,038	1,194,931	4,399,157	4,967,720
Other	267,180	334,979	67,800	267,231	52	223,832	279,432	55,600	261,064	252,509
TOTAL EXPENSES	7,345,409	7,585,045	239,636	7,338,899	(6,510)	4,966,597	6,304,187	1,337,589	7,956,432	8,454,364
Total per ADA	20,734	20,576	(158)	20,716	18				21,773	23,704
INCOME / (LOSS)	(39,196)	356	(39,552)	(49,912)	10,715	(803,697)	(764,613)	(39,083)	147,987	79,188

6 Cash Balance (in \$1,000's)



Year-End Cash Balance		
Projected	Budget	Variance
1,364,443	1,253,984	110,459

7 Balance Sheet

Balance Sheet	6/30/2019	3/31/2020	4/30/2020	6/30/2020 FC
Assets				
Cash, Operating	1,417,586	1,462,017	1,735,951	1,364,443
Cash, Restricted	0	0	0	0
Accounts Receivable	818,812	112,321	112,321	1,476,263
Due From Others	285,782	6,822	6,822	6,822
Other Assets	403,369	25,282	25,675	25,675
Net Fixed Assets	798,368	531,242	509,620	466,273
Total Assets	3,723,917	2,137,683	2,390,389	3,339,476
Liabilities				
A/P & Payroll	185,003	(23,903)	3,705	153,705
Due to Others	34,341	55,207	55,207	89,793
Deferred Revenue	338,032	0	0	0
Total Debt	31,367	0	0	0
Total Liabilities	588,743	31,304	58,912	243,497
Equity				
Beginning Fund Bal.	2,987,188	3,135,174	3,135,174	3,135,174
Net Income/(Loss)	147,987	(1,028,796)	(803,697)	(39,196)
Total Equity	3,135,174	2,106,379	2,331,478	3,095,978
Total Liabilities & Equity	3,723,917	2,137,683	2,390,389	3,339,476
Days Cash on Hand	67	75	89	70
Cash Reserve %	18.4%	20.7%	24.5%	19.3%



BERT CORONA CHARTER SCHOOL

Financial Analysis

April 2020

Net Income

Bert Corona Charter School is projected to achieve a net income of -\$39K in FY19-20 compared to \$K in the board approved budget. Reasons for this negative \$40K variance are explained below in the Income Statement section of this analysis.

Balance Sheet

As of April 30, 2020, the school's cash balance was \$1.74M. By June 30, 2020, the school's cash balance is projected to be \$1.36M, which represents a 19% reserve.

As of April 30, 2020, the Accounts Receivable balance was \$112K, down from \$112K in the previous month, due to the receipt of revenue earned in FY18-19.

As of April 30, 2020, the Accounts Payable balance, including payroll liabilities, totaled \$4K, compared to -\$24K in the prior month.

As of April 30, 2020, BCCS had a zero debt balance.

Income Statement

Revenue

Total revenue for FY19-20 is projected to be \$7.31M, which is \$279K or 3.7% under budgeted revenue of \$7.59M.

LCFF Revenue is projected to be lower than budget by \$146K due to lower enrollment.

Federal Nutrition Revenue is lower than budget by \$82K

SB740 Revenue is projected to be lower than by \$93K due to decrease in prorated other costs reimbursement from 50% to 0% and addition of 5% reduction to rent reimbursement

Grant Revenue is higher than budget by \$26K due to receipt of an additional CASA grant

Fundraising is higher than budget by \$42K due to donation from Parent Account.

Expenses

Total expenses for FY19-20 are projected to be \$7.35M, which is \$240K or 3.2% under budgeted expenditures of \$7.59M.

Certificated Salaries are lower than budget by \$106K due to an open position and some salaries being lower than budgeted.

Certificated Salaries are higher than budget by \$130K primarily due to GEAR UP staff employed directly with the school for 2 month. This is offset by savings in Other Consultant Services of \$108K.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.



Nutrition Food Costs are lower than budget by \$113K due to school closure

Vendor Repairs are higher than budget by \$63K.

Depreciation Expense is projected to be lower than budget by \$73K

ADA

Budgeted average ADA for FY19-20 is 368.63 based on an enrollment of 382 and a 97.0% attendance rate.

The forecast assumes an ADA of 354.27 based on an enrollment of 374 and a 96.0% attendance rate.

In Month 6, ADA was 351.61 with 374 students enrolled at the end of the month and a 94.5% ADA rate.

Average ADA for the year (through Month 6) is 354.27 (a 95.8% ADA rate for the year to date).

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.

1 Key Performance Indicators

ADA vs. Budget ● Cash on Hand ●
 Net Income / (Loss) ● Year-End Cash ●

KEY POINTS

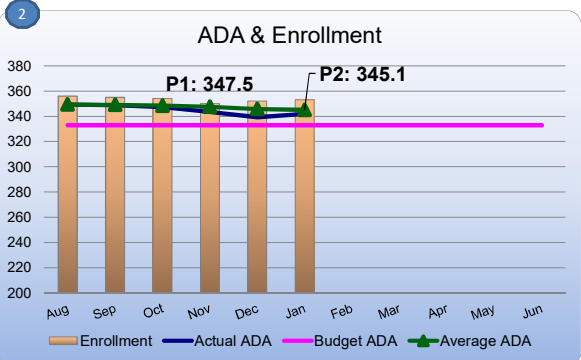
P2 ADA was 345.07 with ending enrollment of 353 students.

Revenue is projected to be above budget by \$174K mainly due to higher than budgeted enrollment and receipt of \$50K reimbursement from the Gas Company

Expenses are projected to be above budget by \$48K due decrease of Nutrition Program Costs that are offset by higher salaries and higher Contracted Substitute Costs

Overall, net loss is \$522K which is \$125K above budget. New Building Depreciation cost is \$728K. Net Operating Income without new building depreciation is \$202K

Cash on hand at June 30th is \$2.5M which represents 55.6% of total expense.



3 Average Daily Attendance Analysis

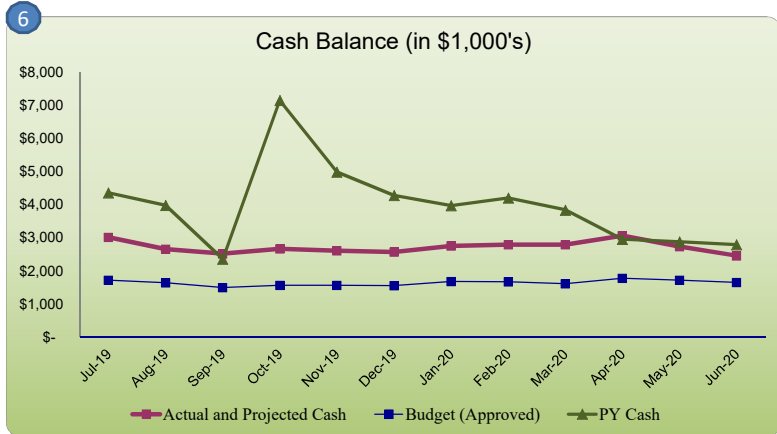
Category	Actual through Month 6	Forecasted P2	Budgeted P2	Better/ (Worse)	Prior Month Forecast	Prior Year P2
Enrollment	353	353	345	8	353	340
ADA %	97.6%	97.4%	96.5%	0.9%	97.8%	97.0%
Average ADA	345.07	345.07	332.93	12.14	345.07	329.13

4 LCFF Supplemental & Concentration Grant Factors

Category	Budget	Forecast	Variance	Prior Year
Unduplicated Pupil %	95.9%	95.8%	-0.2%	95.9%
3-Year Average %	96.3%	96.2%	0.0%	96.1%
District UPP C. Grant Cap	85.5%	85.5%	0.0%	83.0%

5 INCOME STATEMENT

INCOME STATEMENT	Forecast	VS. Budget		VS. Last Month		FY 19-20 YTD			Historical	
	As of 04/30/20	FY 19-20 Budget	Variance B/(W)	Prior Month FC	Variance B/(W)	Actual YTD	Budget YTD	Variance B/(W)	FY 18-19	FY 17-18
Local Control Funding Formula	3,700,317	3,568,158	132,160	3,700,317	0	2,836,502	2,699,741	136,761	3,409,039	3,123,973
Federal Revenue	498,042	537,316	(39,274)	498,079	(37)	412,849	295,600	117,249	554,092	552,291
State Revenue	202,399	197,471	4,928	202,399	(0)	63,626	136,350	(72,724)	6,982,364	12,294,372
Other Local Revenue	298,226	225,933	72,293	297,746	480	252,176	168,070	84,106	260,909	318,784
Grants/Fundraising	13,453	10,000	3,453	18,453	(5,000)	13,453	4,001	9,452	17,250	34,250
TOTAL REVENUE	4,712,437	4,538,877	173,559	4,716,994	(4,557)	3,578,606	3,303,761	274,845	11,223,654	16,323,670
Total per ADA	13,656	13,633	23	13,670	(13)				34,101	49,839
w/o Grants/Fundraising	13,617	13,603	14	13,616	1				34,049	49,734
Certificated Salaries	1,206,014	1,187,825	(18,189)	1,208,846	2,832	981,005	978,534	(2,471)	1,191,556	1,030,222
Classified Salaries	525,110	486,959	(38,151)	523,137	(1,974)	432,236	398,133	(34,103)	439,467	518,009
Benefits	546,009	561,466	15,457	552,634	6,625	475,059	468,600	(6,459)	534,898	567,560
Student Supplies	469,850	512,039	42,189	471,088	1,238	362,683	401,380	38,698	1,292,297	423,984
Operating Expenses	1,601,089	1,451,004	(150,085)	1,566,229	(34,860)	938,824	1,214,098	275,274	1,426,232	1,334,467
Other	886,568	987,016	100,448	884,828	(1,739)	726,328	811,447	85,119	407,190	42,372
TOTAL EXPENSES	5,234,641	5,186,309	(48,331)	5,206,761	(27,879)	3,916,134	4,272,192	356,057	5,291,639	3,916,613
Total per ADA	15,170	15,578	408	15,089	81				16,078	11,958
INCOME / (LOSS)	(522,204)	(647,432)	125,228	(489,768)	(32,436)	(337,528)	(968,430)	630,902	5,932,015	12,407,057



Year-End Cash Balance

Projected	Budget	Variance
2,456,230	1,651,077	805,153

7 Balance Sheet

Balance Sheet	6/30/2019	3/31/2020	4/30/2020	6/30/2020 FC
Assets				
Cash, Operating	2,436,105	2,722,636	2,989,289	2,456,230
Cash, Restricted	352,326	72,902	72,902	0
Accounts Receivable	536,018	0	0	580,089
Due From Others	2,698	2,000	2,000	2,000
Other Assets	23,009	26,285	26,854	26,854
Net Fixed Assets	28,913,251	28,447,358	28,379,245	28,316,210
Total Assets	32,263,408	31,271,183	31,470,290	31,381,383
Liabilities				
A/P & Payroll	644,553	220,856	241,635	341,635
Due to Others	341,905	352,070	351,486	396,969
Deferred Revenue	150,214	150,214	150,214	150,214
Total Debt	7,844,033	7,795,230	7,781,780	7,732,065
Total Liabilities	8,980,704	8,518,369	8,525,114	8,620,883
Equity				
Beginning Fund Bal.	17,350,689	23,282,704	23,282,704	23,282,704
Net Income/(Loss)	5,932,015	(529,891)	(337,528)	(522,204)
Total Equity	23,282,704	22,752,813	22,945,176	22,760,500
Total Liabilities & Equity	32,263,408	31,271,182	31,470,290	31,381,383

Available Line of Credit				
Days Cash on Hand	182	226	247	203
Cash Reserve %	49.9%	62.1%	67.7%	55.6%





MONSEÑOR OSCAR ROMERO CHARTER SCHOOL

Financial Analysis

April 2020

Net Income

Monsenor Oscar Romero Charter School is projected to achieve a net income of -\$522K in FY19-20 compared to -\$647K in the board approved budget. Reasons for this positive \$125K variance are explained below in the Income Statement section of this analysis.

Balance Sheet

As of April 30, 2020, the school's cash balance was \$2.99M. By June 30, 2020, the school's cash balance is projected to be \$2.46M, which represents a 56% reserve.

As of April 30, 2020, the Accounts Receivable balance was zero. All FY18-19 Revenue has been received.

As of April 30, 2020, the Accounts Payable balance, including payroll liabilities, totaled \$242K, compared to \$221K in the prior month.

As of April 30, 2020, MORCS had a debt balance of \$7.78M compared to \$7.80M in the prior month. An additional \$50K will be paid this fiscal year.

Income Statement

Revenue

Total revenue for FY19-20 is projected to be \$4.71M, which is \$174K or 3.8% over budgeted revenue of \$4.54M.

LCFF Revenue is projected to be higher than budget by \$132K due to higher than budgeted enrollment.

Federal Nutrition Revenue is projected to be lower than budget by \$51K due to school closure.

Other Local Revenue is higher than budget by \$50K due to a refund from SoCal Gas

Expenses

Total expenses for FY19-20 are projected to be \$5.23M, which is \$48K or 0.9% over budgeted expenditures of \$5.19M.

Certificated Salaries are forecasted to be \$18K above budget

Classified Salaries are forecasted to be \$38K above budget

Health Insurance Costs are forecasted to be \$37K below budget

Non-Capital Equipment Costs are forecasted to be \$39K above budget due to purchase of additional Chromebooks

Nutrition Costs are lower than budget by \$84K due to school closure.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.



Contracted Substitute Costs are forecasted to be \$30K above budget based on the last 9 month of actuals.

Depreciation costs are projected to be lower than budget by \$101K.

ADA

Budgeted average ADA for FY19-20 is 332.93 based on an enrollment of 345 and a 96.5% attendance rate.

The forecast assumes an ADA of 345.07 based on an enrollment of 353 and a 97.4% attendance rate.

In Month 6, ADA was 341.89 with 353 students enrolled at the end of the month and a 97.0% ADA rate.

Average ADA for the year (through Month 6) is 345.07 (a 97.6% ADA rate for the year to date).

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$20,000 and 10%.

1 Key Performance Indicators

ADA vs. Budget ● Cash on Hand ●
 Net Income / (Loss) ● Year-End Cash ●

KEY POINTS

P2 ADA was 181.14 with ending enrollment of 195 students, 37 less than budgeted.

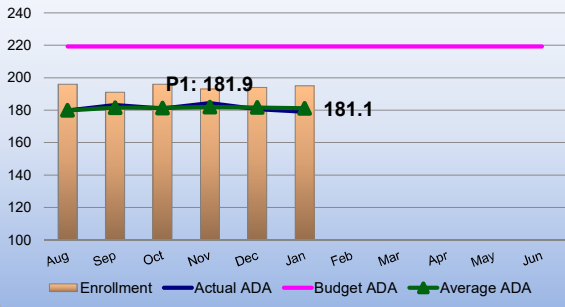
Revenue is below budget by \$506K mainly due to lower than budgeted enrollment

Expenses are lower than budget by \$496K mainly due savings in salaries and other costs

Overall, net income is \$409 which is \$9K below budget.

Cash on hand at June 30th is \$179K which represents 6.8% of total expense.

2 ADA & Enrollment



3 Average Daily Attendance Analysis

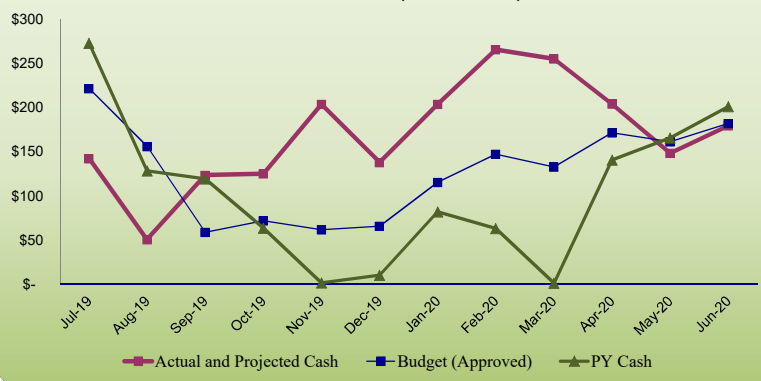
Category	Actual through Month 6	Forecasted P2	Budgeted P2	Better/ (Worse)	Prior Month Forecast	Prior Year P2
Enrollment	195	195	232	(37)	195	222
ADA %	94.1%	94.0%	95.0%	-1.0%	92.9%	94.0%
Average ADA	181.14	181.14	219.24	(38.10)	181.14	222.93

4 LCFF Supplemental & Concentration Grant Factors

Category	Budget	Forecast	Variance	Prior Year
Unduplicated Pupil %	81.0%	93.7%	12.7%	81.1%
3-Year Average %	82.0%	85.9%	3.9%	83.2%
District UPP C. Grant Cap	85.5%	85.5%	0.0%	84.0%

INCOME STATEMENT	Forecast	VS. Budget		VS. Last Month		FY 19-20 YTD			Historical	
	As of 04/30/20	FY 19-20 Budget	Variance B/(W)	Prior Month FC	Variance B/(W)	Actual YTD	Budget YTD	Variance B/(W)	FY 18-19	FY 17-18
Local Control Funding Formula	2,295,716	2,726,183	(430,467)	2,295,716	0	1,870,627	2,067,655	(197,028)	2,716,059	2,211,079
Federal Revenue	200,882	254,104	(53,222)	200,882	0	165,893	143,977	21,916	235,881	229,785
State Revenue	57,534	62,785	(5,251)	57,534	0	41,875	26,275	15,600	299,784	77,294
Other Local Revenue	146,151	164,025	(17,874)	144,690	1,461	112,241	111,381	860	203,095	173,965
Grants/Fundraising	13,202	12,000	1,202	22,421	(9,219)	13,202	9,717	3,485	40,547	22,166
TOTAL REVENUE	2,713,486	3,219,097	(505,611)	2,721,243	(7,757)	2,203,838	2,359,005	(155,167)	3,495,366	2,714,289
Total per ADA	14,980	14,883	297	15,023	(43)				15,679	13,958
w/o Grants/Fundraising	14,907	14,628	279	14,899	8				15,497	13,844
Certificated Salaries	877,893	1,179,167	301,274	881,784	3,890	720,983	962,383	241,400	1,094,402	820,842
Classified Salaries	298,856	272,980	(25,876)	298,031	(825)	248,348	226,761	(21,586)	408,964	321,007
Benefits	400,040	493,615	93,575	405,195	5,155	350,724	409,810	59,086	530,086	462,142
Student Supplies	187,645	281,755	94,110	188,722	1,077	147,270	224,731	77,461	324,559	300,657
Operating Expenses	885,931	922,649	36,718	882,063	(3,868)	783,412	772,383	(11,029)	1,020,213	737,046
Other	62,711	59,201	(3,510)	62,711	0	52,266	49,334	(2,932)	30,819	23,527
TOTAL EXPENSES	2,713,077	3,209,367	496,291	2,718,505	5,428	2,303,002	2,645,402	342,400	3,409,043	2,665,222
Total per ADA	14,978	14,639	(339)	15,008	(30)				15,292	13,706
INCOME / (LOSS)	409	9,730	(9,321)	2,738	(2,329)	(99,164)	(286,397)	187,233	86,323	49,067

6 Cash Balance (in \$1,000's)



Year-End Cash Balance		
Projected	Budget	Variance
179,288	181,839	(2,550)

7 Balance Sheet

Balance Sheet	6/30/2019	3/31/2020	4/30/2020	6/30/2020 FC
Assets				
Cash, Operating	201,140	255,080	203,968	179,288
Cash, Restricted	0	0	0	0
Accounts Receivable	430,541	0	0	219,546
Due From Others	0	33	33	33
Other Assets	7,877	15,947	15,947	15,947
Net Fixed Assets	221,535	178,497	173,275	162,829
Total Assets	861,093	449,557	393,222	577,643
Liabilities				
A/P & Payroll	92,330	59,918	59,918	139,918
Due to Others	286,361	74	74	4,922
Deferred Revenue	0	0	0	0
Total Debt	50,008	8,343	0	0
Total Liabilities	428,699	68,334	59,992	144,840
Equity				
Beginning Fund Bal.	346,071	432,394	432,394	432,394
Net Income/(Loss)	86,323	(51,172)	(99,164)	409
Total Equity	432,394	381,222	333,230	432,803
Total Liabilities & Equity	861,093	449,557	393,222	577,643
Days Cash on Hand	22	35	28	25
Cash Reserve %	6.0%	9.6%	7.7%	6.8%



Bert Corona Charter High School Financial Analysis April 2020

Net Income

Bert Corona Charter High School is projected to achieve a net income of \$K in FY19-20 compared to \$10K in the board approved budget. Reasons for this negative \$9K variance are explained below in the Income Statement section of this analysis.

Balance Sheet

As of April 30, 2020, the school's cash balance was \$204K. By June 30, 2020, the school's cash balance is projected to be \$179K, which represents a 7% reserve.

As of April 30, 2020, the Accounts Receivable balance was zero. All FY18-19 Revenue has been received.

As of April 30, 2020, the Accounts Payable balance, including payroll liabilities, totaled \$60K, compared to \$60K in the prior month.

As of April 30, 2020, BCHS had a Revolving Loan balance of zero compared to \$8K in the prior month. Due to BCCS will be zero at 06/30/20.

Income Statement

Revenue

Total revenue for FY19-20 is projected to be \$2.71M, which is \$506K or 15.7% under budgeted revenue of \$3.22M.

Local Control Funding Formula - State Aid, is projected to be under budget by \$430K due to lower projected ADA.

Object 8220 – Nutrition Revenue is projected to be lower than budget by \$27K due to school closure

Object 8291 – Title I Revenue is projected to be lower than budget by \$18K due to lower enrollment.

Object 8792 – SPED AB602 Revenue is projected to be lower than budget by \$21K due to lower enrollment.

Expenses

Total expenses for FY19-20 are projected to be \$2.71M, which is \$496K or 15.5% under budgeted expenditures of \$3.21M.

Certificated Salaries, are projected to be under budget by \$301K.

Classified Salaries, are projected to be over budget by \$26K.

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$12,000 and 10%.



STRS expenses, are projected to be under budget by \$46K, due to lower Certificated salaries.

H&W Expenses is projected to be below budget by \$48K.

Student Materials expense is projected to be under budget by \$17K

Other Supplies expense is projected to be under budget by \$15K

Food and Food supplies is projected to be under budget by \$49K due to lower enrolment and school closure

Field Trip Costs are projected to be under budget by \$12K due to school closure

Contracted Substitute Costs are projected to be over budget by \$66K due to open teacher positions.

Intra Agency Cost expense is projected to be under budget by \$62K due to lower enrollment.

ADA

Budgeted average ADA for FY19-20 is 219.24 based on an enrollment of 232 and a 95.0% attendance rate.

The forecast assumes an ADA of 181.14 based on an enrollment of 195 and a 94.0% attendance rate.

In Month 6, ADA was 178.94 with 195 students enrolled at the end of the month and a 92.8% ADA rate.

Average ADA for the year (through Month 6) is 181.14 (a 94.1% ADA rate for the year to date).

This report will discuss revenue and expenditure variances from the Board-approved budget that are above \$12,000 and 10%.

**YPI Charter Schools
Check Register
From 04/01/20 to 04/30/20**

Vendor Name	Check Number	Effective Date	Transaction Description	Check Amount
7 LAYER IT SOLUTIONS, INC.	308138	4/29/2020	5/20- MANAGEMENT SERVICE & LINUX SERVER GOLD PACKAGE	1,120.00
A-TECH SYSTEMS	308105	4/9/2020	3/17/20 - ALARM 2 HOURS ON SITE SERVICES	325.00
AFLAC WORLDWIDE HEAD QUARTERS	308139	4/29/2020	4/20- HEALTH PREMIUM ACC#JBP28	2,378.58
ALBERT J. FUENTES	307248	4/27/2020	SCHCLMT - SELF CARE PD STIPENDS - ALBERT FUENTES	105.00
AT&T	308077	4/6/2020	2/16-3/15/20 FAX 213 351-1305 & LATE FEE	407.86
AT&T MOBILITY	308121	4/22/2020	3/20-4/19/20- CELL PHONES SERVICES ACC#287254464371	849.71
BRENDA CATARINO	308080	4/6/2020	REIM - SAM'S CLUB, 99 CENTS STORE, & THE HOME DEPOT	234.98
BRENDA CATARINO	308141	4/29/2020	REIM - APPLE STORE & HOME DEPOT	216.50
BUR-CAL TERMITE & PEST CONTROL INC.	308079	4/6/2020	10/1/19 -TREATED CAMPUS AND CLASS ROOMS FOR MOSQUITOS	585.00
BUR-CAL TERMITE & PEST CONTROL INC.	308079	4/6/2020	8/28/20- SCHOOL CAMPUS TREATED FOR GENERAL PEST	385.00
COLLEGE ENTRANCE EXAMINATION BOARD	308081	4/6/2020	10/19 - PSAT-NMSQT - SAT MANUAL, STUDY GUIDE, & DIAG. TEST F	882.00
Department Of Industrial Relations	308082	4/6/2020	2/5/20 ELEVATOR INSPECTION	225.00
Department Of Industrial Relations	308082	4/6/2020	2/5/20- ELEVATOR INSPECTION	225.00
DIRECTED	308083	4/6/2020	2/10-2/14/20- SPECIAL ED SERVICES	4,281.06
DIRECTED	308083	4/6/2020	2/17-2/21/20- SPECIAL ED SERVICES	9,004.23
DIRECTED	308083	4/6/2020	2/2-2/7/20- SPECIAL ED SERVICES	1,117.11
DIRECTED	308083	4/6/2020	2/24-2/28/20- SPECIAL ED SERVICES	13,470.89
DIRECTED	308083	4/6/2020	2/9-2/14/20- SPECIAL ED SERVICES	1,666.18
DIRECTED	308083	4/6/2020	3/2-3/6/20- SPECIAL ED SERVICES	12,296.11
DIRECTED	308106	4/9/2020	3/9/20- SUBSTITUTE SERVICES	245.00
DIRECTED	308122	4/22/2020	3/16-3/20/20- SPECIAL ED SERVICES	1,405.73
DIRECTED	308122	4/22/2020	3/9-3/13/20- SPECIAL ED SERVICES	4,663.03
DIRECTED	308122	4/22/2020	3/9-3/13/20- SPECIAL ED SERVICES	9,401.31
DIRECTED	308142	4/29/2020	3/25-3/26/20- SPECIAL ED SERVICES	83.00
DIRECTED	308142	4/29/2020	3/30-4/1/20- SPECIAL ED SERVICES	783.00
DIRECTED	308142	4/29/2020	3/31/20- SPECIAL ED SERVICES	876.00
DIRECTED	308142	4/29/2020	4/10- SPECIAL ED SERVICES	96.00
DIRECTED	308142	4/29/2020	4/9-4/10/20- SPECIAL ED SERVICES	657.00
EMPLOYMENT DEVELOPMENT DEPARTMENT	04/28/20 - SUI	4/28/2020	Q1 - 2020 - SUI PAYMENT	720.20
EXED	308123	4/22/2020	03/20 - MANAGEMENT CONTRACT FEE, CALPADS & SIS, & UPS	20,711.43
EXPLORELEARNING	308084	4/6/2020	RENEWAL OF EXTEACH GIZMOS TEACHER PLUS STUDENTS LICENSE	1,750.00
FIYA	308085	4/6/2020	LEAGUE FEE GIRLS AND BOYS BASKETBALL 2020 (2)	990.00
FRANCISCO TOPETE	308120	4/15/2020	3/16-3/31/20- MAINTENANCE	156.00
FRANCISCO TOPETE	308120	4/15/2020	3/16-3/31/20- MAINTENANCE SERVICES	480.00
FRANCISCO TOPETE	308159	4/29/2020	4/1-4/15/20- MAINTENANCE SERVICES	1,199.00
FRONTIER	308086	4/6/2020	3/13-4/12/20- FAX 818- 834-8075	228.83
FRONTIER	308143	4/29/2020	4/13-5/12/20-0 FAX 818 834-8075	227.34
Gordon & Rees	308160	4/30/2020	03/20 - LEGAL SERVICES	3,198.00
GREEN WORKS SOLUTIONS	308089	4/6/2020	RETROFIT LIGHT FIXTURES, LED TROFFER FIXTURES, FLANGE MAIN D	3,500.00
GREEN WORKS SOLUTIONS	308089	4/6/2020	WELD NEW BRACKET EXTERIOR DOOR CLOSURE EXTENSION OF CHAIN	1,900.00
GREEN WORKS SOLUTIONS	308115	4/15/2020	BLEACHERS PAINT. BATHROOM CLEAN UP/SANITIZE AND REINSTALL SI	2,237.00
GREEN WORKS SOLUTIONS	308145	4/29/2020	SET UP MAIN OFFICE TV AND SET UP CUSTODIAN ROOM FOR WASHER	7,420.00
HESS AND ASSOCIATES, INC.	308146	4/29/2020	Q3 FY-1920 RETIREMENT REPORT	195.00
HOME DEPOT CREDIT SERVICES	308147	4/29/2020	02/05 - 03/04/20 - CARD ENDING 6922	143.84
IMPACT CANINE SOLUTIONS	308107	4/9/2020	3/3/20- CANINE SERVICES	185.00
IMPACT CANINE SOLUTIONS	308107	4/9/2020	3/5/20- CANINE SERVICES	185.00
INLAND MECHANICAL SERVICES	308148	4/29/2020	4/20- AC MAINTENANCE SERVICES	460.00
JENNIFER MARIE ARCHER	308076	4/6/2020	FY18/19 - STRS REFUND	38.18
KELLY PAPER	308108	4/9/2020	COPY PAPER MULTIPURPOSE, ENVELOPES	564.25
LA DEPT. OF WATER AND POWER	308090	4/6/2020	2/14-3/17/20- ELECTRIC, SEWER, & WATER CHARGES	3,829.81
LA DEPT. OF WATER AND POWER	308116	4/15/2020	3/3-4/1/20- ELECTRIC CHARGES	4,289.74
LAW OFFICES OF YOUNG, MINNEY & CORR, LLP	308117	4/15/2020	03/20 - LEGAL SERVICES	329.65
LAW OFFICES OF YOUNG, MINNEY & CORR, LLP	308150	4/29/2020	1/20- LEGAL SERVICES (OVER ALLOCATION)	1,992.71
LAW OFFICES OF YOUNG, MINNEY & CORR, LLP	308150	4/29/2020	2/20- LEGAL SERVICES (OVER ALLOCATION)	2,572.65
LAW OFFICES OF YOUNG, MINNEY & CORR, LLP	308150	4/29/2020	3/20- LEGAL SERVICES (OVER ALLOCATION)	1,647.32
LORENCE SIMONSEN	308157	4/29/2020	REIM - CREDENTIAL APPLICATION -EMERGENCY EL & TEMPORARY	202.50
Lorenzo Garcia	308087	4/6/2020	REIM - AMAZON, PETCO, & PETSMAST	163.18
Lorenzo Garcia	308124	4/22/2020	REIM - FOOD4LESS, SMART& FINAL, 99CENTS STORE, SMART & FINAL	519.89
LOS ANGELES COUNTY OFFICE OF EDUCATION	04/30/20 - STRS	4/30/2020	04/20 - FY19/20 - STRS PAYMENT	92,441.01
LOS ANGELES UNIFIED SCHOOL DISTRICT	308151	4/29/2020	05/20 - RENT PRORATA SHARE FOR BER CORONA HS	18,631.34
LUIS GIRON	308088	4/6/2020	3/20- LANDSCAPING SERVICES	800.00
LUIS GIRON	308144	4/29/2020	4/20- LANDSCAPING SERVICES	800.00
MAJOR METROPOLITAN SECURITY	308091	4/6/2020	REPLACE FIRE SYSTEM BATTERIES	135.00
MAJOR METROPOLITAN SECURITY	308125	4/22/2020	5/20 - MONITORING SERVICES	285.00
MAJOR METROPOLITAN SECURITY	308125	4/22/2020	5/20- BURGLAR ALARM MONITORING SERVICES	55.00
MAJOR METROPOLITAN SECURITY	308125	4/22/2020	5/20- FIRE ALARM MONITORING SERVICES	65.00
MASERGY CLOUD COMMUNICATIONS, INC	308078	4/6/2020	3/20- COMMUNICATIONS SERVICES	1,560.60
MASERGY CLOUD COMMUNICATIONS, INC	308078	4/6/2020	3/20- COMMUNICATIONS SERVICES NON-ERATE	211.34
MASERGY CLOUD COMMUNICATIONS, INC	308140	4/29/2020	4/20- COMMUNICATIONS SERVICES	1,552.59
MASERGY CLOUD COMMUNICATIONS, INC	308140	4/29/2020	4/20- COMMUNICATIONS SERVICES NON-ERATE	211.00
MCCALLA COMPANY	308118	4/15/2020	CUSTODIAL & OTHER FACILITY OPERATIONS SUPPLIES	134.15
MCCALLA COMPANY	308118	4/15/2020	CUSTODIAL SUPPLIES	32.30
MCCALLA COMPANY	308118	4/15/2020	GLOVES	15.35
MCCALLA COMPANY	308118	4/15/2020	PLASTIC SCRAPER	31.50
MCCALLA COMPANY	308126	4/22/2020	CUSTODIAL SUPPLIES	160.12
MCCALLA COMPANY	308152	4/29/2020	CUSTODIAL & OTHER SUPPLIES	173.75
OFFICE 360	308092	4/6/2020	OFFICE SUPPLIES	496.02
OFFICE 360	308092	4/6/2020	OFFICE SUPPLIES & FOOD (NON NUTRITION PROGRAM)	479.23
OFFICE 360	308092	4/6/2020	PREMOISTENED HAND SANITIZING WIPES, CLOTH, 5 3/4" X 7", 10	8.86
OFFICE 360	308154	4/29/2020	OFFICE AND CLASSROOM MATERIALS	342.78

**YPI Charter Schools
Check Register
From 04/01/20 to 04/30/20**

Vendor Name	Check Number	Effective Date	Transaction Description	Check Amount
OFFICE 360	308154	4/29/2020	PRESENTATION DISPLAY BOARDS, 48 X 36, WHITE, 4/CARTON (6)	133.96
Oscar Montes Sarabia	308111	4/9/2020	WALMART- PAINT SET FOR STUDENTS FUN ACTIVITIES	38.11
PAYCOM PAYROLL, LLC	04/15/20-PR	4/15/2020	PAYROLL TRANSFER	519.22
PAYCOM PAYROLL, LLC	04/30/20-PR	4/30/2020	PAYCOM FEES - 04/30/20 PAYROLL	516.38
PETER HUANG AND LORETTA HUANG	308155	4/29/2020	05/20 - RENT	5,144.56
PETER HUANG AND LORETTA HUANG	308155	4/29/2020	3/11-4/15/20- ELECTRIC CHARGES	300.71
PLANCONNECT	308128	4/22/2020	1/01- 3/31/20- 403B QUARTERLY DUES	100.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/13/20- SPECIAL ED SERVICES	675.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/20/20- SPECIAL ED SERVICES	900.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/21/20- SPECIAL ED SERVICES	450.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/21/20-SPECIAL ED SERVICES	225.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/26/20 SPECIAL ED SERVICES	225.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/26/20- SPECIAL ED SERVICES	225.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/27/20- SPECIAL ED SERVICES	225.00
PRN NURSING CONSULTANTS	308094	4/6/2020	2/28/20- SPECIAL ED SERVICES	225.00
PURE WATER OF LA	308129	4/22/2020	4/20- WATER COOLER MONTHLY MAINTENANCE	76.65
Quadient	308109	4/9/2020	03/17/20 - POSTAGE ACCT# 8323	608.24
Quadient	308110	4/9/2020	2/20-3/20-POSTAGE	293.75
Quadient	308127	4/22/2020	3/20-POSTAGE, FLEXLIMIT PROTECTION FEE, & EQUIPMENT RENTAL	2,213.00
Quadient	308153	4/29/2020	3/20-POSTAGE BALANCE	43.95
REPUBLIC SERVICES #902	308104	4/9/2020	4/20- WASTE DISPOSAL SERVICES ACC#9496	1,242.49
SFVJACC	308149	4/29/2020	05/20 - RENT	9,500.00
SFVJLI	308156	4/29/2020	05/20 - RENT ROOM 4&5	850.00
SOCAL OFFICE TECHNOLOGIES, INC	308095	4/6/2020	12/29-3/28/20 OVERAGE CHARGE #CNA7355-01	2,106.80
SOCAL OFFICE TECHNOLOGIES, INC	308095	4/6/2020	12/29-3/28/20- OVERAGE CHARGE CONTRACT #CNA7357-01	1,765.37
SOCAL OFFICE TECHNOLOGIES, INC	308095	4/6/2020	2/13-3/12/20- OVERAGE CHARGE CONTRACT#CNA7384-01	527.77
SOCAL OFFICE TECHNOLOGIES, INC	308095	4/6/2020	3/28-4/27/20-BASE RATE CHARGE #CNA6494-01	162.82
SOCAL OFFICE TECHNOLOGIES, INC	308112	4/9/2020	03/16 - 04/20/20 BASE RATE CHARGE CONTRACT#CNA1945-02	9,013.99
SOCAL OFFICE TECHNOLOGIES, INC	308130	4/22/2020	4/16-5/15/20- BASE RATE CHARGES #CNA1945-02	626.20
SOUTHERN CALIFORNIA GAS COMPANY	308131	4/22/2020	3/13-4/13/20- GAS CHARGES	555.22
Sparkletts	308096	4/6/2020	2/20 BOTTLED WATER ACC#0236	118.01
Sparkletts	308132	4/22/2020	3/20 COOLER	5.99
Sparkletts	308132	4/22/2020	3/20-WATER COOLER ACC#0211	4.99
STAPLES	308097	4/6/2020	ELMER'S ALL PURPOSE SCHOOL GLUE STICKS, 0.24 OZ., 30/PACK (3	37.12
STAPLES	308097	4/6/2020	STUDENT MATERIALS	242.32
STS EDUCATION	308133	4/22/2020	HP 14 INCH CHROMEBOOKS FOR DISTANCE LEARNING (115)	30,912.58
SUCCESS FOR ALL FOUNDATION, INC.	308134	4/22/2020	2/25/20- ON SITE TRAINING CONTRACT#103437	2,550.00
SUCCESS FOR ALL FOUNDATION, INC.	308134	4/22/2020	3/6/20 ON SITE TRAINING CONTRACT#103437	2,550.00
SYNCB/AMAZON	308119	4/15/2020	3/20 AWS MARKETPLACE	7.44
SYNCB/AMAZON	308119	4/15/2020	ACRYLIC PAINT ACRYLIC PAINT SET FOR ART, 24 COLOR 2 OZ BASIC	32.83
SYNCB/AMAZON	308119	4/15/2020	CLASSROOM & OFFICE SUPPLIES	152.76
SYNCB/AMAZON	308119	4/15/2020	KICK DOWN DOOR STOP ULTRA GRIP RUBBER REPLACEMENT TIP 10 PA	15.31
SYNCB/AMAZON	308158	4/29/2020	OFFICE SUPPLIES	106.46
T-MOBILE	308101	4/6/2020	1/28-2/27/20 -GEAR-UP CELL PHONE - CLOSED ON 3/7 & CREDIT	58.33
The College Board	308098	4/6/2020	SAT SCHOOL DAY WITH ESSAY 12TH GRADE	3,225.00
The Education Team	308099	4/6/2020	3/2/20- SUBSTITUTE SERVICES	294.26
The Education Team	308099	4/6/2020	3/6/20- SUBSTITUTE SERVICES	255.60
The Education Team	308113	4/9/2020	3/9/20- SUBSTITUTE SERVICES	259.68
Think Together	308100	4/6/2020	INSTALLMENT 6- COMPREHENSIVE MANAGEMENT OF ASES	24,929.91
UNUM	308135	4/22/2020	5/20 - PREMIUM ACCT# 0933184-001 5	917.50
UNUM	308135	4/22/2020	5/20- PREMIUM ACC#0836771-001 1	936.80
WAXIE SANITARY SUPPLY	308102	4/6/2020	SPARTAN DMQ NEUTRAL DISINFECTANT CLEANER- 4X1 GL	230.48
WAXIE SANITARY SUPPLY	308136	4/22/2020	WIPES PLUS DISINFECTING WIPE 75 COUNT TUB - 6 PER CASE	23.16
XEROX FINANCIAL SERVICES	308103	4/6/2020	3/12-4/11/20- COPIER LEASE ACCT#010-0042733-001	1,857.46
XEROX FINANCIAL SERVICES	308103	4/6/2020	3/13-4/12/20- COPIER LEASE # 010-0058450-003	342.42
XEROX FINANCIAL SERVICES	308103	4/6/2020	3/29-4/28/20- COPIER LEASE #010-0058450-002	409.43
XEROX FINANCIAL SERVICES	308103	4/6/2020	3/29-4/28/20- COPIER LEASE# 010-0058450-001	1,017.35
XEROX FINANCIAL SERVICES	308114	4/9/2020	3/7-4/6/20 COPIER LEASE #010-0042736-001	709.75
XEROX FINANCIAL SERVICES	308137	4/22/2020	4/12-5/11/20- COPIER LEASE #010-0042733-001	1,857.46
XEROX FINANCIAL SERVICES	308137	4/22/2020	4/13-5/12/20- COPIER LEASE# 010-0058450-003	342.42
Total				362,535.75

Coversheet

ExED Contract

Section: V. Items Scheduled For Action
Item: F. ExED Contract
Purpose: Vote
Submitted by:
Related Material: YPI Charter Schools - ExED Contract 2020-21.pdf

EXCELLENT EDUCATION DEVELOPMENT MANAGEMENT AND ACCOUNTING SERVICES AGREEMENT

This Management and Accounting Services Agreement (the “Agreement”) is entered into as of the 30th day of June 2020 (the “Effective Date”) by YPI Charter Schools, Inc (“Client”), a California nonprofit public benefit corporation, and Excellent Education Development (“ExED”), a California nonprofit public benefit corporation, with reference to the following facts:

BACKGROUND

ExED is in the business of providing accounting and related business services to charter schools in California (the “Services” as defined below). Client represents that it has authority to operate multiple charter schools authorized by the Chartering Authority, as defined below. In consideration of the premises, and of the mutual covenants and conditions contained herein, Client and ExED agree as follows:

1. DEFINITIONS

- a. “ADA” means the average daily attendance, reported as required by the California Department of Education that must be filed by the Client with the State of California in accordance with applicable laws and regulations.
- b. “Additional Services” means any supplemental services to be provided by ExED at request of Client. If Additional Services are part of this Agreement, they are described in a Schedule entitled “Additional Services Scope of Work to be Performed by ExED” and attached hereto. Additional services supplement the Basic Services provided by ExED under this Agreement.
- c. “Affiliate” means nonprofit corporations or limited liability companies that are controlled by or under common control with Client. In this Agreement, the following corporation(s) or limited liability companies are Affiliates of Client: Not Applicable.
- d. “Auditor” means an independent certified public accountant selected by Client to prepare annual audited financial statements for Client, as required by California Education Code 41020.
- e. “Basic Services” means the services provided by ExED as selected by Client and described in Schedule A.
- f. “Board” means the governing body of the Client.
- g. “Budget” means the current and future budgets of the Client prepared by ExED in coordination with the Client as described in this Agreement and adopted by the Board.
- h. “Categorical Funding Applications” means State funding programs for which the Client may be eligible and apply for and not included within the Local Control Funding Formula (LCFF).
- i. “Chartering Authority” means the local school district or county office of education or state board of education that has issued a charter to Client to operate a School.
- j. “Client Administrator” means one or more Client staff or Board member(s) in leadership positions authorized to work with ExED with respect to the services outlined in this Agreement. Unless otherwise notified in writing, the Client

Administrator herein shall be (i) the chief executive officer, executive director or equivalent, (ii) the presiding officer of the Board, and (iii) the principal or head of school for matters pertaining to any specific School operated by Client.

- k. “Confidential Information” means any and all technical and non-technical information including copyright, trade secret, and proprietary information, inventions, know-how, processes and algorithms, software programs, and software source documents. Confidential Information includes, without limitation, information acquired from a Student Information System, financial information, procurement requirements, purchasing information, plans and personnel information of the parties, and student information as protected under the Family Educational Rights and Privacy Act (FERPA) and other privacy protection laws, as applicable to the operations of Client and ExED under this Agreement.

Confidential Information does not include information that: (a) is now publicly or generally known or available or that hereafter, through no act or failure on the part of the receiving party, or through any violation of law or contract becomes generally known or available; (b) is legally known to the receiving party at the time of receiving such information; (c) is furnished to others by the disclosing party without a restriction on disclosure; (d) is hereafter furnished to the receiving party by a third party without restriction on disclosure, where such third party legally obtained such information and the right to disclose it to the receiving party; or (e) is independently developed by the receiving party without violation of any legal rights which the disclosing party may have in such information.

- l. “P-1/P-2” means the attendance reports that must be submitted to the State of California for ADA apportionment purposes.
- m. “myExED Portal” means the ExED client portal (myexed.org) and the associated applications made available to select Client staff via this website.
- n. “Paycom” is a third-party human capital management software provider that Client has contracted with to provide payroll processing and other human resource services.
- o. “Paycom Alternate” means Paychex, a payroll processing service alternative to Paycom. If this box is checked with an “X”, Client has elected to use a Paycom Alternate for the term of this Agreement: Not Applicable .
- p. “Proprietary Property of ExED” means all right, title and interest in and to the materials and systems developed and used by ExED in the performance of the Agreement including, without limitation, all trade secrets, know-how, protocols, policies, specifications, software, forms, as well as additions and modifications thereto developed and/or used by ExED in the furtherance of its operations and in performance of its obligations under this Agreement. Proprietary Property also includes ExED work product, reports, templates, studies, specifications, business methods, tools, methodologies, techniques, solution construction aids, analytical frameworks, algorithms, products, documentation, abstracts and summaries thereof that do not contain or embody Client’s Confidential Information. Proprietary Property includes “ExED Core Business Components,” defined as those general skills, know-how, expertise, techniques, methodologies, processes, templates, and business methods that are acquired or developed during the performance of the Agreement and that are related to ExED’s primary business, such as, by way of example, but not of limitation, methodologies and processes for managing school budgets and financial reporting, that do not contain or embody Client’s Confidential

Information. Proprietary Property also includes “ExED Knowledge Capital,” which means ExED materials existing prior to commencement of the Agreement, or developed outside the scope of the Agreement, that are proprietary to ExED, and all associated intellectual property rights and any enhancements and modifications to such materials, whether or not such enhancements and modifications are developed as part of the Agreement.

- q. “School” means each charter school that Client has been authorized to operate by a Chartering Authority, which is actually operated by Client and included in the scope of the Services described herein.
- r. “Services” means the Basic Services and any Additional Services agreed upon by the parties as further described in Schedule A and additional Schedules (if applicable) attached hereto.
- s. “Student Information System (SIS)” refers to a web-based student information system used to maintain individual-level data including student demographics, course data, discipline, assessments, staff demographics, staff assignments, and other data.
- t. “Site” means a site at which Client conducts its business.
- u. “Standard Financial Reports” means the financial reports prepared by ExED for Client Administrators or the Board. See Schedule A for list of reports included.
- v. “State Budget” means the current budget of the State of California as approved and signed by the Governor of the State of California for the current fiscal year.
- w. “State Standardized Account Codes” means the account codes mandated by the California Department of Education.

2. THE SERVICES

- a. Basic Services. During the term of this Agreement, ExED will provide Client with the Basic Services described on Schedule A. ExED shall provide Client a non-exclusive, non-assignable license to use the Proprietary Property of ExED solely for Client operations, at no additional cost, during the term of this Agreement.
- b. Additional Services. Client may request ExED to provide additional Services. If ExED agrees to provide Additional Services, the Additional Services will be described in detail in a separate Schedule to be added to this Agreement and signed by authorized representatives of both parties. Charges, fees, responsibilities and obligations with respect to the Services will be adjusted as described in that Schedule.
- c. Prior Term Services. Client may request ExED to provide services pertaining to a period prior to the term of the Agreement. If ExED agrees to provide prior term services, the services will be described in a separate Schedule to be added to this Agreement and signed by authorized representatives of both parties. Charges, fees, responsibilities and obligations with respect to the prior term services will be adjusted as described in that Schedule.
- d. Services to Affiliates. ExED is not providing any services to Affiliates of Client under this Agreement. Client shall cause its Affiliates to engage ExED for a separate scope of services or shall manage the financial affairs of its Affiliates without ExED assistance. If ExED has been engaged by one or more Affiliates to provide services, and Client has been designated to pay for such services (in lieu of paying higher rent,

otherwise required for the Affiliate to pay directly), Client agrees that ExED fees for such services will be billed to and due from Client.

3. PAYMENT AND TERMS

- a. Fees and Charges. During the term of this Agreement, Client will pay ExED a fee of \$222,282 for the 2020-21 school year for the Basic Services and reimburse ExED for its actual, reasonable out-of-pocket expenses incurred in providing the Basic Services as provided for in Schedule A. These out-of-pocket expenses will not exceed \$150 per month without prior, written authorization from the Client.
- b. Invoicing. ExED will invoice Client \$18,523.50 monthly from July 1st, 2020, through June 30, 2021, as well as for out-of-pocket expenses incurred not to exceed \$150 per month without prior written authorization from the Client. ExED will automatically prepare a check for ExED's payment on a monthly basis for execution by the person authorized by the Client to execute such checks.
- c. Payment Terms. Payment is due thirty (30) days from the date of delivery of the monthly invoice.
- d. Right to Suspend Performance. In the event of default or delay in payment greater than 45 days from the date of delivery of the monthly invoice, ExED reserves the right to suspend part or all of its performance of duties under this Agreement until all amounts for Services that are due and payable are paid in full. In the event Client disputes all or any portion of the invoice that is due, Client shall notify ExED within 20 days of receipt of the invoice; and initiate the dispute resolution process under Section 10 hereof, but shall pay the invoice in full, pending the outcome of such process.
- e. Taxes. Except as expressly stated in this Agreement, ExED and Client are responsible for any and all taxes on their respective incomes, and for payment and withholding of all applicable taxes, including but not limited to income, property and sales taxes.
- f. Late Payments. Payments made after the 30-day period set forth in Section 3.c. are subject to a late payment penalty equal to a monthly rate of 1%, not to exceed the maximum allowed under applicable law.
- g. Price Changes. The prices and related charges for the Services are subject to increase upon renewal of this Agreement.

4. RELATIONSHIP OF THE PARTIES

- a. Independent Contractors. ExED and Client are independent contractors. No representations or assertions shall be made nor actions taken by either party that would create any agency, joint venture, partnership, employment or trust relationship between the parties with respect to the subject matter of this Agreement. Except as may be expressly agreed upon in this Agreement or a Schedule attached hereto, neither party has any authority or power to enter into any agreement, contract or commitment on behalf of the other, or to create any liability or obligation whatsoever on behalf of the other, to any third person or entity.
- b. No Benefits. No ExED employee is eligible to participate in any benefits programs offered by Client to its employees, nor in any pension plans, insurance plans or other similar plans offered by Client to its employees.

- c. Employees. Each party will exercise day-to-day control over and supervision of their respective employees, including, but not limited to, hiring, evaluation, promotion, demotion, compensation, employee benefits, discipline and discharge. All work assignments, instruction, scheduling, staffing and direction of Client employees shall be the exclusive province of the Client. Each party is responsible for obtaining and maintaining worker's compensation coverage and unemployment insurance for its employees.
- d. Subcontractors. ExED reserves the right to subcontract with other individuals and businesses for the Services. ExED will be responsible for its subcontractors, all payments to subcontractors, and the direction and control of the work to be performed by, its subcontractors, if any. All subcontractors, if any, will be required by ExED to comply with the terms and conditions of this Agreement respecting Client Confidential Information.

5. THE CLIENT'S OBLIGATIONS.

- a. Authorized Personnel. The Client Administrator(s) identified herein are authorized to work with ExED and authorize their staff to work with ExED with respect to the services outlined in this Agreement.
- b. Alternative Contacts. The Board may also identify, in writing to ExED, its key or principal contact, if other than the Client Administrator, who is authorized to receive and disclose Confidential Information, receive payroll checks and discuss personnel issues; as well as an alternate contact in the event the Client Administrator cannot or should not serve as the Client's contact due to conflict or suspected misconduct. In the absence of such designated persons, the chief executive officer and the presiding officer of the Board shall have such authority.
- c. Financial Records and Audit.
 - (i) The Client will maintain customary and reasonably correct, complete and accurate books and records of account as required by the United States government, the State of California (and any other funding authority such as philanthropic organizations). The Client will deliver all supporting documentation in accordance with the monthly close timeline developed by ExED and provided to Client.
 - (ii) The Client will obtain a timely annual audit of its books and records from a qualified independent certified public accounting firm and immediately provide ExED with a copy of any annual audit and related reports, notes or statements. Client authorizes and instructs ExED to work with Client's Auditor on any matter or issue pertinent to the Services and will confirm such authorization upon request by ExED.
 - (iii) Client covenants that it will respond promptly and professionally to any and all questions or investigations from the Chartering Authority, any governmental investigating or funding authority or Client's Auditor, to the extent required by law, including exceptions noted in any independent accountant's report.
- d. Coordination and Cooperation. Client will cause the Client Administrator(s) and other authorized staff members to work closely and cooperatively with ExED to facilitate the effective performance and delivery of the Services. Client will comply

with and respond promptly to all reasonable requests of ExED for information or documents from the Client.

- (i) Client covenants to: assist ExED in reconciling outstanding invoices, and to provide ExED with copies or originals of vendor invoices and correspondence, as well as other statements and receipts in accordance with the monthly close deadline established by ExED.
 - (ii) Client staff with access to the myExED Portal will take reasonable steps to maintain the confidentiality of their myExED login credentials. Client staff will notify ExED if the confidentiality of their myExED login credentials has been compromised.
 - (iii) Client staff will take reasonable steps to ensure the security of the devices used to access the myExED Portal and will use their best effort to notify ExED if the security of a device has been compromised.
 - (iv) Client staff will only use the myExED Portal for work related activities.
- e. Payroll. Client will provide all necessary and proper data to ExED for payroll processing and retirement reporting, if applicable.
- (i) All original documents as it relates to personnel files or payroll logs will be maintained at the Client Site.
 - (ii) If necessary, Client will use, and purchase if necessary to use, commercially reasonable time clocks for timekeeping purposes.
 - (iii) The following provisions shall apply unless Client is using a Paycom Alternate for the term of this Agreement:
 - (1) Client will sign, or has signed, the Paycom Payroll Service Agreement and Paycom will deposit and file Client's Federal, State Withholding and State Disability taxes and tax returns, quarterly and annual, associated with payrolls processed through Paycom. Paycom will file Client's annual forms W-2/W-3.
 - (2) Client will be responsible for all fees and charges assessed by Paycom.
 - (3) Client will submit all necessary payroll and time and attendance data within the Paycom software.
 - (4) Client will be responsible for maintaining employee information, not related to payroll processing, within the Paycom software.
 - (5) Client will be responsible for working with Paycom to setup and track any payroll accruals (e.g., vacation, sick, etc.)
 - (iv) Client will approve all final check calculations. ExED will follow California labor code when calculating an employee's final check unless directed by the Client to follow the calculation method commonly used by school districts.
 - (v) Client is responsible for complying with the retirement reporting rules for the retirement program(s) the Client participates in (e.g., CalSTRS, CalPERS) and is responsible for communicating to ExED the following information:

- (1) How to classify staff per the rules of the respective retirement program(s)
 - (2) How to report time and wages per the rules of the respective retirement program(s).

- f. Attendance Records and Reports. Client must take all necessary and proper steps to provide regular, accurate and timely responses to daily attendance tracking reports.
 - (i) Client is responsible for taking daily attendance records compliant with the California Education Code. Client must maintain phone logs, tardy logs and other pertinent information related to appropriate attendance tracking.

- g. Grant and Funding Requirements. Client covenants to make good faith effort to comply with all material grant and funding requirements, including record keeping, reporting, management and financial controls and policies and procedures.
 - (i) Client to prepare Semiannual Certifications and/or Personnel Activity Reports to account for wages paid for with federal funds.

- h. Chartering Authority Requirements. Client covenants to make good faith efforts to comply with all material requirements, including policies and procedures, of the Chartering Authority to the extent applicable to the Client.

- i. Client Policies and Procedures. Client covenants to develop, apply and follow not less than customary and reasonable policies and procedures applicable to: Human Resources, Payroll Administration, Internal Financial Controls, Accounts Payable and other disbursements and, if applicable, competitive bid procedures for vendors.

- j. Insurance. Client will obtain and maintain customary and reasonable general liability coverage for its facilities and operations. ExED shall be entitled to request evidence of such coverage.

- k. Notice and Information. Client covenants that it will provide ExED with prompt, complete and accurate notice of and information concerning any material errors in Client data and Client's books and records, as well as with respect to investigations or inquiries into the Client, its activities, operations and reports by the Chartering Authority or any other governmental authority, to the extent permitted by law. Client will promptly provide ExED with copies of every report or notice provided to the Chartering Authority or any other governmental agency, including any schedules or exhibits thereto, to the extent such report or notice relates to the Services outlined in this Agreement.

- l. Designation of ExED. Client hereby designates employees and subcontractors of ExED whose duties require access to Confidential Information, including personnel and student information, as having a legitimate educational interest under FERPA.

- m. Protection of Proprietary Property of ExED. Client shall maintain the confidentiality of all Proprietary Property of ExED and shall not divulge such information to any third parties both during the term of this Agreement and after its termination except
 - (i) as may be necessary for the discharge of its obligations under this Agreement, and
 - (ii) as required by law. Client shall take reasonable precautions against disclosure of any Proprietary Property of ExED to any unauthorized person by any of its officers, directors, employees or agents. Client shall not directly or indirectly, without the express prior written permission of ExED, use the Proprietary Property of ExED for

any purpose except to the limited extent necessary for the conduct of its operations in accordance with this Agreement. Upon termination of this Agreement for any reason, Client shall cease all use of Proprietary Property of ExED.

- n. Integrity and Financial Responsibility. Client will act with integrity and alert the management of ExED to any fraudulent activity which is reasonably related to the Services as soon as the Client becomes aware, to the extent permitted by law. Client acknowledges that ExED's ability to provide Services is premised upon the Client acting in a financially prudent manner, including but not limited to timely approval of balanced budgets and maintaining a positive variance to budget throughout the year to the extent feasible.

6. REPRESENTATIONS AND WARRANTIES OF CLIENT

- a. Organization of Client. Client is a California nonprofit public benefit corporation, duly organized, validly existing, and in good standing under the laws of the State of California and eligible for determination as a tax-exempt organization which has all requisite power and authority to own, lease and operate its properties and to carry on its educational operations as they are now being conducted.
- b. Corporate Power and Authorization. Client has full corporate power and authority to execute and deliver this Agreement and to perform its obligations hereunder. The execution, delivery and performance of this Agreement by Client have been duly authorized by all necessary corporate action. This Agreement has been duly executed and delivered by Client and constitutes the valid and legally binding obligation of Client enforceable in accordance with its terms and conditions. Client need not give any notice to, make any filing with, or obtain any authorization, consent, or approval of any government or governmental agency in order to consummate the transactions contemplated by this Agreement.
- c. No Breach. Neither the execution and delivery of this Agreement, nor the consummation of the transactions contemplated hereby, will (i) violate any, statute, regulation, rule, injunction, judgment, order, decree, ruling, charge, or other restriction of any government, governmental agency, or court to which Client is subject or any provision of its Articles of Incorporation, Bylaws or Charter, nor (ii) conflict with, result in a breach of, constitute a default under, result in the acceleration of, create in any party the right to accelerate, terminate, modify, or cancel, or require any notice under any agreement, contract, lease, license, instrument or other arrangement to which Client is a party or by which it is bound or to which any of its assets is subject.

7. REPRESENTATIONS AND WARRANTIES OF ExED

- a. Corporate Power and Authorization. ExED has full corporate power and authority to execute and deliver this Agreement and to perform its obligations hereunder. The execution, delivery and performance of this Agreement by ExED have been duly authorized by all necessary corporate action. This Agreement has been duly executed and delivered by ExED and constitutes the valid and legally binding obligation of ExED enforceable in accordance with its terms and conditions. ExED need not give any notice to, make any filing with, or obtain any authorization, consent, or approval of any government or governmental agency in order to consummate the transactions contemplated by this Agreement.
- b. No Breach. Neither the execution and delivery of this Agreement, nor the consummation of the transactions contemplated hereby, will (i) violate any, statute, regulation, rule, injunction, judgment, order, decree, ruling, charge, or other restriction

of any government, governmental agency, or court to which ExED is subject or any provision of its Articles of Incorporation or Bylaws or (ii) conflict with, result in a breach of, constitute a default under, result in the acceleration of, create in any party the right to accelerate, terminate, modify, or cancel, or require any notice under any agreement, contract, lease, license, instrument or other arrangement to which ExED is a party or by which it is bound or to which any of its assets is subject.

- c. Insurance. ExED will obtain and maintain customary and reasonable comprehensive commercial general liability, professional liability, crime, and cyber liability insurance appropriate to its business under this Agreement.
- d. No Duty to Monitor Compliance with Obligations. In the course of its work, and consistent with Client's obligations hereunder, ExED may become aware of instances of non-compliance by Client with its own policies, procedures or other obligations described in Section 5 of this Agreement. ExED may bring such failures to the attention of the point of contact or chief executive officer or the presiding officer of the Board, but shall have no obligation to do so, unless the failure directly and materially affects ExED's ability to carry out its obligations under this Agreement or is the basis for termination of the Agreement for cause.
- e. Confidentiality. ExED shall keep all Confidential Information made available to it under this Agreement confidential to the extent required by law; provided that nothing herein shall be construed as restricting ExED in performing the Services, which require routine disclosure of such information to Auditors, Chartering Authorities, regulatory agencies, insurance carriers, service providers and suppliers, and the Client. Confidential Information shall be handled by ExED, its employees and subcontractors as follows:
 - (i) Except as set forth in (vi) below, ExED shall not use the Confidential Information disclosed by the Client pursuant to this Agreement for any purpose other than carrying out its obligations under this Agreement.
 - (ii) ExED and any ExED subcontractors granted access to Client Confidential Information, will take reasonable steps to maintain the confidentiality of Client's Confidential Information and will notify Client if the confidentiality has been compromised.
 - (iii) ExED and any ExED subcontractors will take reasonable steps to ensure the security of the devices used by their staff to access Client Information and will use their best effort to notify Client if the security of a device has been compromised.
 - (iv) ExED shall maintain reasonable security measures to safeguard the Confidential Information.
 - (v) ExED may, but shall not be required to, destroy the Confidential Information in its possession when no longer needed to carry out the purposes of this Agreement. To the extent such Confidential Information resides only on equipment or in files owned or controlled by ExED, upon termination of this Agreement, ExED shall provide copies to Client at Client's expense. ExED shall require its employees and subcontractors to agree to comply with these Standard Conditions for the handling of Confidential Information.

(vi) Notwithstanding the foregoing, ExED shall have the right to use Client Confidential Information in a non-identifiable way, as part of its overall database of information about public charter schools. For example, Client salaries may be included in overall information ExED compiles, and provides to Client, about the range of salaries offered by similar schools.

f. Limited Services Warranty. ExED represents and warrants that it has the requisite personnel, equipment, expertise, experience and skill to perform its obligations hereunder and provide the Services to Client in a timely and professional manner.

(i) Disclaimer of all Other Warranties.

THERE ARE NO WARRANTIES THAT EXTEND BEYOND THE FACE HEREOF. ExED DISCLAIMS ALL OTHER REPRESENTATIONS AND WARRANTIES, EXPRESS OR IMPLIED, REGARDING THE SERVICES, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

(ii) Limited Remedy. Client's exclusive remedy for defective Services – upon ExED's confirmation of the defect after receiving notice of a claimed defect from Client – is re-performance of the Services by ExED at ExED's expense.

(iii) Limitation of Liability. EVEN IF ExED CANNOT OR DOES NOT REPERFORM ANY DEFECTIVE SERVICES, AND CLIENT'S EXCLUSIVE REMEDY FAILS OF ITS ESSENTIAL PURPOSE, ExED'S (INCLUDING ITS DIRECTORS, OFFICERS, AND EMPLOYEES') TOTAL AND AGGREGATE LIABILITY, WHETHER ARISING IN TORT, CONTRACT, MISREPRESENTATION, BREACH OF WARRANTY OR FOR ANY OTHER CAUSE OF ACTION SHALL NOT EXCEED \$62,500, OR ExED'S TOTAL ANNUAL FEES FOR SERVICES RENDERED PURSUANT TO THIS AGREEMENT, WHICHEVER AMOUNT IS GREATER. IN NO EVENT SHALL ExED BE LIABLE TO THE CLIENT OR ANYONE CLAIMING THROUGH THE CLIENT FOR SPECIAL, INCIDENTAL, CONSEQUENTIAL, PUNITIVE OR EXEMPLARY DAMAGES SUFFERED BY THE CLIENT OR ANY AFFILIATE OF THE CLIENT, WHETHER OR NOT SUCH DAMAGES WERE OR COULD HAVE BEEN FORESEEABLE TO ExED. NO DIRECTOR, OFFICER OR EMPLOYEE OF ExED SHALL BE LIABLE TO CLIENT OR ANYONE CLAIMING THROUGH THE CLIENT ON ACCOUNT OF ANY ACT OR OMISSION OF ExED, REGARDLESS OF THE NATURE OF SUCH ACT OR OMISSION OF ExED, OR THE THEORY OF LIABILITY ASSERTED AGAINST ExED OR SUCH DIRECTOR, OFFICER OR EMPLOYEE OF ExED, EITHER INDEPENDENTLY OR IN A VICARIOUS CAPACITY.

(iv) Allocation of Risk. Client acknowledges that the pricing of the Services and the other terms of this Agreement have been set based on the foregoing sections of this Agreement providing for an agreed allocation of the risk for any defective Services between the parties. Client further acknowledges

that the pricing and terms would have been different if there had been a different allocation of the risk.

- g. Warranty Exclusion. ExED MAKES NO WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, REGARDING THIRD PARTY SOFTWARE OR HARDWARE.
- h. Limited Liability. EXCEPT FOR FAILURE TO COMPLY WITH THE PROPRIETARY RIGHTS PROVISIONS CONTAINED IN THIS AGREEMENT:

IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER PARTY FOR ANY LOSS OR INJURIES TO EARNINGS, PROFITS OR GOODWILL, OR FOR ANY INCIDENTAL, SPECIAL, PUNITIVE OR CONSEQUENTIAL DAMAGES OF ANY PERSON OR ENTITY WHETHER ARISING IN CONTRACT, TORT OR OTHERWISE, EVEN IF EITHER PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

THE LIMITATIONS SET FORTH IN THIS SECTION SHALL APPLY EVEN IF ANY REMEDIES FAIL IN THEIR ESSENTIAL PURPOSE.

8. INDEMNITIES.

Client and ExED indemnify each other and hold each other, and each other's officers, directors, employees, agents harmless, from and against any and all direct claims, costs, losses, liabilities and expenses for personal injury and property damage, including reasonable attorneys' fees, attributable to their actions and omissions under this Agreement, but excluding claims that would not be made but for the gross negligence or willful misconduct of the party seeking indemnification.

9. TERM AND TERMINATION EXPIRATION.

This Agreement shall continue in full force and effect from July 1, 2020, until June 30, 2021.

- a. Termination for Uncured Breach. If either party to this Agreement materially defaults in the performance of any of the terms of this Agreement, the non-defaulting party may terminate this Agreement by providing written notice of termination to the defaulting party of the nature of the default or material breach of this Agreement and the termination shall be effective thirty days from receipt of notice unless the defaulting party cures such default within said thirty-day period.
- b. Insolvency. In the event that either party is unable to pay its debts when they become due, declares bankruptcy or insolvency, or makes an assignment for the benefit of its creditors, the other party may terminate this Agreement upon written notice.
- c. Other Rights. The rights of the parties to terminate this Agreement are not exclusive of any other rights and remedies available at law or in equity, and such rights are cumulative. The exercise of any right or remedy under this section 10 does not preclude the exercise of any other right or remedy.
- d. Termination for convenience. Either party may terminate this Agreement upon 30 days written notice to the other party, without cause. During the notice period, the parties shall cooperate to wind up and complete the pending work for the current month.
- e. Immediate termination for cause. ExED may immediately terminate this Agreement in the event it determines that it cannot provide the Services in a professional manner,

due to the actions or inaction of the Client with respect to financial controls and management; in such event, ExED will cooperate with Client to transition its duties to Client personnel or another vendor.

- f. Non-Renewal. If Client chooses not to contract with ExED for services after the term of this Agreement, ExED will complete the services pertaining to the fiscal year covered by this Agreement in a timely fashion, but no later than six months after the term of this Agreement. After this time, Client may request ExED to provide services pertaining to the term of the Agreement or prior terms. If ExED agrees to provide services, the services and fees will be described in a separate Agreement.

10. DISPUTE RESOLUTION.

Any controversy or claim, whether based on contract, tort, strict liability, fraud, misrepresentation, or any other legal theory, arising out of either party's performance of this Agreement ("Dispute") shall be resolved solely in accordance with the terms of this Section 10.

- a. Resolution Sequence. If the Dispute cannot be settled by good faith negotiation between the Chief Executive Officers of the parties – which must take place within thirty days of receipt by one party of a claim of a Dispute – ExED and Client will submit the Dispute to non-binding mediation in Los Angeles. If complete agreement cannot be reached within thirty days of submission to mediation, any remaining issues will be resolved by binding arbitration in accordance with Sections (c) and (d) below. Except as otherwise provided herein, arbitration shall be governed by the provisions of the California Code of Civil Procedure, commencing with Section 1280.
- b. Arbitrator. A single Arbitrator who is a retired judge and knowledgeable in commercial matters will conduct the arbitration. The Arbitrator's decision and award will be final, must be made in writing with findings of fact and conclusions of law, will be binding and may be entered in any court with jurisdiction. The Arbitrator will not have authority to make errors of law or legal reasoning, nor to modify or expand any of the provisions of this Agreement. The Arbitrator will not have the authority to award damages not permitted by this Agreement.
- c. Rules and Expenses. Any mediation or arbitration commenced pursuant to this Agreement will be conducted under the then current rules of the alternate dispute resolution ("ADR") firm in the site selected by the parties. If the parties are unable to agree on an ADR firm, the parties will conduct the mediation and, if necessary, the arbitration, under the then current rules and supervision of the American Arbitration Association. ExED and Client will each bear its own attorneys' fees associated with the mediation and, if necessary, the arbitration. ExED and Client will pay all other costs and expenses of the mediation/arbitration as the rules of the selected ADR firm provide. ExED and Client shall divide the amounts charged by the ADR firm equally.
- d. Equitable Relief and Indemnification. Each of the parties acknowledges and agrees that due to the unique nature of the Confidential Information and the Proprietary Information of ExED there can be no adequate remedy of law for any breach of its obligations to maintain the confidentiality and security of such information, and that any breach may allow the breaching party or third parties to unfairly compete with the non-breaching party resulting in irreparable harm to the non-breaching party that cannot be adequately compensated for through damages. Therefore, notwithstanding the foregoing provisions of this Section 10, upon any such breach or any threat

thereof, the non-breaching party may, at its option, seek temporary, preliminary, and permanent injunctive relief and to be indemnified by the breaching party from any loss or harm, including without limitation, actual attorney fees, in connection with any breach or enforcement of the breaching party's obligations to keep the non-breaching party's information confidential and secure, or the unauthorized use or release of any such proprietary or confidential information. Each party will notify the other party in writing immediately upon the occurrence of any unauthorized release or other breach of which it is aware. The obligations of the parties under this paragraph shall survive the expiration or termination for any reason of this Agreement.

- e. Limitation on Actions. Any Dispute either party may have against the other with respect to this Agreement must be brought within two years after the cause of action arises. This Section 10 shall survive the expiration or termination for any reason of this Agreement.

11. GENERAL.

- a. Entire Agreement. This Agreement sets forth the entire agreement between the parties hereto, fully supersedes any and all prior agreements or understandings pertaining to the subject matter hereof and no change in, modification of or addition, amendment or supplement to this Agreement shall be valid unless set forth in writing and signed and dated by each and all of the parties hereto subsequent to the execution of this Agreement.
- b. Waiver in Writing. During the term of this Agreement, neither party shall be deemed to have waived any right, power or privilege under this Agreement or any provision thereof unless such waiver shall have been duly executed in writing and acknowledged by the party to be charged with such waiver.
- c. No Implied Waiver. The failure of any party to act or exercise its rights hereunder upon the breach of any of the terms or conditions hereof shall not be construed as a waiver of such breach, nor shall it prevent such party from hereafter enforcing strict compliance with any and all of the terms and conditions herein set forth.
- d. Communications. Any notice or other communication required by, or permitted to be made by or given to, either party pursuant to this Agreement shall be sent to such party by registered, certified or express mail, postage prepaid or prepaid courier service, addressed to such party at its address set forth below, or to such other addresses as such party shall designate by written notice given to the other party, and shall be deemed to have been made, given or provided on the date of receipt.

Client: 9400 Remick Ave
Pacoima, CA 91331
E-mail: ykingberg@ypics.org

ExED: 11858 La Grange Avenue 2nd Floor
Los Angeles, CA 90025
E-mail: tanderson@exed.net

- e. Applicable Law. This Agreement shall be construed, and the legal relations between the parties hereto shall be determined, in accordance with the laws of the State of California, provided, however, that any provision of this Agreement which may be prohibited by or otherwise held invalid under such laws shall be ineffective only to the

extent of such prohibition or invalidity and shall not invalidate or otherwise render ineffective any or all of the remaining provisions of this Agreement.

- f. Assignment; Successors. This Agreement is personal, being entered into in reliance upon and in consideration of the skill, qualifications and representations of, and trust and confidence reposed in, ExED and its employees and its selected subcontractors. Accordingly, neither this Agreement nor any of its rights or privileges shall be sold, assigned, transferred, shared, or encumbered, by operation of law or otherwise, without the prior written consent of the affected (non-assigning) party. Subject to the foregoing, this Agreement shall be binding upon and shall inure to the benefit of the parties hereto and their respective successors and assigns.
- g. Force Majeure. Neither party shall be liable for any delay or failure in its performance of any of the acts required by this Agreement when such delay or failure arises from circumstances beyond the control and without the fault or negligence of such party. Such causes may include, without limitation, acts of God, acts of public enemies, acts of civil or military authority, labor disputes, material or component shortages, embargoes, rationing, quarantines, blockades, sabotage, utility or communication failures or delays, earthquakes, fire, flood, epidemics, riots or strikes. The time for performance of any act delayed by any such event may be postponed for a period equal to the period of such delay.
- h. Publicity. Client may act as a reference for ExED with respect to the Services upon ExED's reasonable request. ExED may issue press releases or identify Client in marketing materials provided that all references to Client are fair, accurate and not misleading and approved by Client in writing, in advance, in each instance.
- i. Headings. The headings of the several articles and sections are inserted for convenience of reference only and are not intended to be a part of or to affect the meaning or interpretation of this Agreement.

IN WITNESS WHEREOF, the parties hereto execute this Agreement in counterparts as of the Effective Date through duly authorized representatives.

CLIENT:

By: _____ Dated: _____,

Name: Yvette King-Berg

Title: Executive Director

ExED:

By: _____ Dated: _____,

Name: Tait G. Anderson

Title: Executive Vice President

SCHEDULE A:

SUMMARY OF BASIC SERVICES TO BE PERFORMED BY EXED

- 1) Budgeting
 - A) Budget Development
 - 1) Work with Client administrators to develop an annual budget for each School (4 budgets) for the subsequent fiscal year beginning in March of each year, for approval by Client's governing board no later than June 30th. The budget will be aligned with State Standardized Account Code structure per mandate. The budget will be for the overall organization and will include an annual budget, monthly cash flow for five years, and multi-year projections for the next five years for each School.
 - B) Final Operating Budget
 - 1) Upon the approval of the State Budget, ExED will work with Client Administrator to perform any needed revisions to the Budget to reflect legislation adopted. Revisions, if necessary, will be kept to a minimum and forwarded to the Board for approval.
 - C) Additional Budget Versions
 - 1) As requested by the Client for its charter petition renewal with its Chartering Authority, ExED will prepare the budget to be submitted with the petition.
 - 2) As needed for other purposes including State Budget uncertainty, facility projects, and loan applications, ExED will prepare alternate budget scenarios for the Client. Extensive budget models may require an additional fee, as approved in advance by Client in writing.
 - 3) For new charter school petitions, ExED will prepare the budget to be submitted with the petition for an additional fee of \$2,500.
 - D) Budget & Deferral Monitoring
 - 1) ExED will closely monitor changes to the State Budget revenues and deferral schedule as they change during budget season and throughout the year. ExED will analyze these changes and the impact of these changes on the Client's financial outlook and will notify Client of any significant implications.
- 2) Financial Management, Reporting, and Forecasting
 - A) Standard Financial Reports
 - 1) Prepare and email and/or make electronically available Standard Financial Reports, or subset of Standard Financial Reports approved by Client Administrator, to Client Administrator. The reports will be provided monthly, or on an alternative timeline approved by Client Administrator. If monthly, the Standard Financial Reports will be available by the 10th of the month following month end reconciliation. For example, financial reports for September will be available by November 10th.
 - 2) In this Agreement, "Standard Financial Reports" shall mean:
 - (a) Financial Dashboard (excluded from July Financial Package)
 - (b) Cash Flow Forecast (excluded from July Financial Package)
 - (c) Financial Analysis (excluded from July Financial Package)
 - (d) Income Statement
 - (e) Balance Sheet
 - (f) Statement of Cash Flows
 - (g) Check Register
 - (h) General Ledger
 - B) Financial Dashboard
 - 1) Prepare a dashboard which displays key indicators of financial health – income statement

summary with variances and forecast, cash flow charts with actuals and forecast for the year, ADA chart with actuals and forecast, and balance sheet summary.

- C) Cash Flow Forecast
 - 1) ExED will prepare a Cash Flow Forecast report for each School (4 forecasts) throughout the year as part of the Standard Financial Reports. This report will project cash flow on a monthly basis and will reflect timing of revenue and expenses for the full fiscal year. The report will enable stakeholders to make timely decisions of expense reductions that may need to be made or additional revenue that could be spent. This tool ensures that Client Administrator can understand at any point in the year, what the full fiscal year is expected to look like financially.
 - D) Financial Analysis
 - 1) ExED will perform on-going analysis of actual versus budget revenue and expenses and monitor cash flow. As it relates to Standard Financial Reports, any unusual items and/or unfavorable trends identified by ExED will be reported to the Client at that time.
 - E) Client & Board Meetings
 - 1) At a minimum once every quarter, ExED shall prepare and review Client's financials with Client Administrator.
 - 2) Prepare and present Client's financial health to the Board as appropriate, but no less than once every quarter, and including special Board meetings.
 - 3) Prepare and present Client's financial reports to Finance Committees as appropriate.
 - 4) Present, or arrange for Auditor to present, annual audit to Audit Committee as appropriate.
 - F) Chartering Authority Financial Reporting
 - 1) Complete and submit all financial reporting required to Chartering Authority including First Interim, Second Interim, Unaudited Actuals, and Preliminary Budget as required by any mandated due dates.
 - G) Facility Financing Reporting
 - 1) As appropriate, ExED will assist with preparing necessary facility financing reports and attend facility financing meetings. Extensive facility financing reports may require an additional fee, as approved in advance by Client in writing.
- 3) Accounting and Bookkeeping Services
- A) General Ledger Maintenance
 - 1) Establish and maintain Client's general ledger per the State Standardized Account Code Structure. ExED will monitor and edit revenue and expenditure account code structure, add program and location codes when needed, and perform all other regular maintenance.
 - B) Bookkeeping
 - 1) Record all transactions into accounting system with appropriate coding to enable the required reporting.
 - C) Balance Sheet Reconciliation
 - 1) Perform monthly reconciliation of all bank statements. Quarterly perform reconciliation of remaining balance sheet accounts: Prepaid/Deposits, Accounts Receivable, Accounts Payable, Payroll Liability, Debt/Loans, and any Other Asset or Liability Item. Record monthly depreciation entries and update asset values for items such as property, equipment, and furniture.
 - D) Accounts Payable
 - 1) Process vendor invoices for payments, including: verify approval of payment, determine cash flow availability, verify non-duplication of payment, log appropriate accounting entries, produce check payments, and verify check security. ExED will process vendor invoices approved for payment on a schedule to be determined in consultation with the Client. At a minimum, ExED will process vendor invoices once per week. Any

discrepancies will be reported to the Client within three business days of ExED becoming aware of the discrepancy.

- (a) Rush Checks: Rush checks are strongly discouraged. The Client will be allowed one rush check a month. After that, the Client will be charged a fee of fifty dollars (\$50.00) per rushed check that is the fault of the Client (e.g., invoices held up at the Client site). The Client will also be charged the cost of delivery, if applicable. Rush Checks are defined as checks requested to be sent out immediately, outside normal weekly processing schedule.
 - 2) Complete 1099s for independent contractors.
 - E) Accounts Receivable
 - 1) Monitor receipt of revenue to ensure the Client receives all entitlements. Perform collection activities to receive past due funding from government agencies, not including initiation of legal proceedings.
 - F) Audit Preparation
 - 1) Collect, or arrange for Client to provide, all information required by Auditors (e.g., loan documentation, grant award letters, building leases, copier leases, attendance, National School Lunch Program, public grant documentation, school board minutes, CALPADS reports, internal control questionnaires, etc.).
 - 2) Prepare required schedules (e.g., accrual worksheet, fixed asset ledger, balance sheet account detail, etc.).
 - 3) Serve as the point of contact for all communication with the Auditors regarding financial data maintained by ExED.
 - 4) Prepare and collect required information for Auditor to complete the 990 tax return.
 - 5) Work and meet with Client's Audit Committee as needed.
 - G) Training
 - 1) Train Client personnel on accounting and internal control procedures.
- 4) Cash Management
- A) Cash Position Reports
 - 1) Prepare and distribute weekly cash position report to the Client. The cash position report summarizes current book balance and details checks cut by ExED in last week, outstanding checks that have not cleared the bank, upcoming items such as payroll, and any unpaid bills.
 - 2) As needed, cash position report will include a detailed forecast for the next 30-60 days for cash flow analysis.
 - B) Loans & Lines of Credit
 - 1) Analyze future cash flow needs that may require loan or line of credit.
 - 2) Prepare applications for new and/or renewal of loans or lines of credit.
 - 3) Present loans or lines of credit to board and obtain board resolutions as needed.
 - C) State Revenue Deferral Exemption Applications
 - 1) Analyze future cash flow and determine whether the Client needs to apply for exemption from upcoming deferrals when available. Prepare and complete applications for deferral exemptions.
 - D) Manage timing of invoice payment.
 - E) Plan and manage payment of outstanding debt.
- 5) Payroll Processing and Retirement Reporting
- A) Payroll Processing
 - 1) Paycom. The following provisions shall apply unless Client is using a Paycom Alternate for the term of this Agreement:

- (a) Client shall maintain within the Paycom software, in a manner consistent with the information given to ExED, (i) employee information related to payroll processing and (ii) non-tax payment information, such as voluntary deductions and garnishments.
 - (b) Notify Client if Client does not have sufficient funds to cover its payroll amounts, taxes, processing charges and fees in Client's designated Demand Deposit Account, on or before 1:30 p.m., Central Time, based on one of the following schedules: Three (3) banking days prior to each check date, unless the check date is on a Saturday, Sunday, or bank holiday, in which case four (4) banking days prior to check date.
 - (c) Assist Client in instructing the Bank holding the Client's Demand Deposit Account to honor the charges as initiated from time to time by Paycom.
- 2) Paycom Alternate. If Client is using a Paycom Alternate for the term of this Agreement ExED will (i) process any status updates, new hires, terminations, and or informational changes in the payroll system based on information submitted by the Client on Status Change Request forms, and (ii) calculate and submit to federal and state authorities federal and state payroll tax payments and reports, as required by law and directed by Client.
- 3) Regular Payroll Schedules: ExED will provide the Client a payroll schedule for the calendar year which includes accrual period and deadlines for ExED to receive from the Client the following information: new hire documentation, personnel change forms and payroll time data for each respective pay period. The Client is responsible to submit all information by the deadlines established per Client's payroll schedule. If a client does not submit payroll information by the deadline or submits incomplete information and has to submit additional information after the payroll deadline, the Client will be charged a late fee:
- (a) If payroll information is received after 1:00 PM on the day of the payroll data is due: \$200
 - (b) If payroll information is received after 5:00 PM on the day of the payroll data is due: \$500
- 4) Supplemental Payroll Schedules: For all supplemental payroll schedules requested by the Client, ExED will charge Client at the following rates (note: Client may incur charges from Paycom in addition to ExED charges outlined below):
- (a) Late Submission/Unexpected Payroll Schedules: The Client will be charged a fee of twenty dollars (\$20.00) per check. Such supplemental checks include, but are not limited to:
 - (i) Late Submission of Payroll Data: If the Client submits late payroll information and specifically requests checks be processed as a supplemental run;
 - (ii) Supplemental Checks Regarding Terminating Employees:
 - (i) Involuntary Termination by the Client: California law generally requires an employee who is being terminated to receive a check upon exit from the Client. If the Client anticipates an employee termination, the Client is expected to communicate with ExED's payroll contact as soon as it becomes aware of the termination and work together to get the check to the Client as expeditiously as possible.
 - (ii) Voluntary Termination by Employee: California law generally requires an employee to be paid within 72 hours of terminating. The Client is expected to provide payroll information to ExED's payroll contact immediately upon notification of a terminating employee.
 - (iii) Supplemental Checks Regarding Employees Going on Family/Maternity Leave or Family Medical Leave: The Client is expected to communicate with ExED's payroll contact as soon as it becomes aware that an employee is going on family/maternity leave or leave that falls under the Family and Medical Leave Act.

- (b) Scheduled Bonus/Stipend Supplemental Runs: When a bonus/stipend payroll is agreed upon in advance and ExED is given sufficient lead time to prepare, the Client will not be charged. If the Client requires a quick turnaround (less than 72 hours), ExED will charge the Client twenty dollars (\$20.00) per check.
 - (c) Unscheduled/Emergency Supplemental Runs: When a special check is requested without advance notice and preparation time, the Client will be charged twenty dollars (\$20.00) per check.
 - 5) File and deposit Client's State Unemployment taxes and quarterly returns associated with payrolls processed through Paycom.
 - 6) If Client is closed for school break and cannot receive payroll package, Client can approve payroll package to be mailed to ExED. ExED will deliver the payroll package to Client at the next scheduled school meeting. At Client's direction and Client's expense, ExED can mail out each individual employee's paystub.
 - B) Retirement Reporting
 - 1) STRS/PERS - ExED will timely submit monthly the required information to the local county office of education or the designated 3rd party administrator. The retirement division at the county office of education will then forward the information to CalSTRS/CalPERS. ExED will coordinate remittance of STRS/PERS contributions with the county office of education accounting department via check, ACH or debit from Client's apportionment account.
 - 2) Other retirement plans (e.g., 403B, 401K, 457, etc.) – ExED will process appropriate deductions for employees upon receipt of appropriate paperwork from the Client. ExED will submit payment to the applicable retirement company based on Client payroll schedule.
 - C) Personnel
 - 1) Assist Client in developing sound procedures for management of employee records.
 - 2) Assist Client in completing unemployment insurance claims and workers' compensation audits.
 - 3) If applicable, process and report on summer savings.
- 6) Compliance and Data Management Services
- A) Attendance Reporting
 - 1) Prepare PENSEC 20-Day, P-1, P-2, and Annual attendance reports from Client-provided records and submit to the Chartering Authority as required.
 - 2) Prepare and submit monthly statistical and classification attendance reports, if required to be submitted by Chartering Authority.
 - 3) Attendance Reporting Revisions: All attendance reporting revisions required to be made after submission deadlines agreed to by ExED and Client during which Client confirms attendance data is ready to be run, will be charged at the following rates (in the case Client operates multiple Schools, these charges will be applied for each School that requires an adjustment):
 - (i) The Client will be charged a fee of one-hundred dollars (\$100.00) for each instance and each month the monthly attendance data needs to be revised.
 - (ii) The Client will be charged a fee of one-hundred dollars (\$100.00) if a prior year P-2 adjustment is required.
 - (iii) The Client will be charged a fee of five-hundred dollars (\$500.00) if a CALPADS Unduplicated Pupil Count (UPC) adjustment is required.
 - B) Categorical Funding Applications
 - 1) Prepare funding applications for funding sources identified in Client's Budget. This includes the following (if applicable): Consolidated Application (ConApp), Title III Consortium Application English Learner, the Annual Funding Survey, the PENSEC

- Report for new/expanding schools, SB 740 Facility Grant Program, and the Facilities Incentive Grant, if the Client is eligible and requests that ExED complete the application.
- 2) Assist with budget/financial sections of Public Charter Schools Grant Program (PCSGP) and other grant applications, if applicable.
 - 3) In the event that new funding programs become available, funding program elements and pricing will be revised if the Client wishes ExED to pursue such funding. These applications will be subject to the timelines and conditions of the funding programs and will be the primary responsibility of the Client.
 - 4) While ExED may suggest funding sources and opportunities, Client shall be responsible for identifying those it wishes to pursue.
- C) Compliance and Fiscal Reporting
- 1) Prepare preliminary Budget report and submit to Chartering Authority in required format.
 - 2) Twice a year, prepare Interim Financial Reports and submit to Chartering Authority in required format.
 - 3) Annually, prepare the Unaudited Actuals Report and submit to the Chartering Authority in required format.
 - 4) Provide Local Control Funding Formula (LCFF) funding numbers (LCFF Base Revenue, LCFF Supplemental and Concentration, and Minimum Proportionality Percentage) required for Local Control and Accountability Plan (LCAP). ExED will assist with budget estimates related to the actions and services included in LCAP. However, in order for ExED to assist, Client must share draft LCAP with ExED two weeks prior to submission deadline.
 - 5) Prepare and disseminate fiscal reports to lenders and creditors as appropriate.
 - 6) Prepare and submit federal reporting as appropriate.
 - 7) Prepare and submit Title I, II, III, IV and V reporting as appropriate.
 - 8) Provide assistance as Client prepares Semiannual Certifications and/or Personnel Activity Reports to account for wages paid for with federal funds
 - 9) If appropriate, complete After School Educational & Safety program reporting.
 - 10) Prepare per pupil expenditure section of the School Accountability Report Card (SARC).
 - 11) Prepare school expenditure section of the Civil Rights Data Collection.
- D) Nutrition Claims Reporting
- 1) Prepare monthly claim information for National School Lunch Program, as appropriate, and transfer information into Child Nutrition Information and Payment System (CNIPS). Client reviews, notifies ExED of any discrepancies and submits final monthly claim information in CNIPS.
 - 2) Prepare and submit year-end Cost and Revenue reporting.
 - 3) Provide assistance in preparing for financial components of the School Nutrition Program administrative review.
- 7) Meetings and Trainings
- A) Office Manager Meetings & Document Delivery
- 1) ExED will coordinate with the Client to arrange for how inter-office communication will be delivered to ExED.
- B) Annual ExED Business of Charter Schools Training
- 1) ExED provides an annual training to provide information on various topics relevant to charter school finance and operations. The topics covered in the training may change each year and the training may be provided via online webinars or an in-person training session. In past years, the training has covered topics such as updates on the state budget; best practices for school operations related to internal controls, attendance and

nutrition reporting, payroll, and other procedures and policies; and how to use myExED tools.

- C) Office Manager and other Staff Trainings
 - 1) ExED provides initial and ongoing training as needed to the Office Manager and other Client staff regarding proper internal controls, ExED and Client procedures and policies, and systems or software ExED may employ to serve the Client.
 - D) Finance Committee Guidance
 - 1) ExED provides guidance to the Board and Committee members on best practices to monitor financial reports.
 - E) Client Administrator Meeting
 - 1) ExED's Team Leader meets regularly with Client Administrators to review financial report and any other outstanding issues or concerns. Provides coaching on best practices to monitor Client's finances.
 - F) Chartering Authority Meetings
 - 1) ExED prepares required materials for and attends Chartering Authority fiscal visits.
 - 2) ExED attends charter renewal meetings and hearings as needed. Any air-travel or overnight lodging expenses for ExED staff associated with these meetings will be the responsibility of the Client. Any ExED travel will be pre-approved by the Client.
 - G) WASC Review
 - 1) Prepare fiscal materials for and attend WASC review meetings as needed.
 - H) Other Meetings
 - 1) As needed, ExED meets with county office of education regarding retirement reporting.
- 8) Other Support Systems, Tools, and Services
- A) myExED Portal
 - 1) Provide secure access to myExED Portal (myexed.org) for relevant Client staff to access ExED applications and exchange necessary information.
 - 2) From within the myExED Portal, ExED will provide select Client staff access to various applications, including but not limited to the following:
 - (a) ExED Marketplace (powered by SpendBridge)
 - (b) ExED FileShare (powered by Box)
 - (c) ExED Financials (powered by Power BI)
 - B) Business Guide, Calendar and Newsletter
 - 1) Distribute a monthly newsletter (ExED Monthly) which summarizes important information regarding compliance related deadlines and news.
 - C) Facility Financing
 - 1) If appropriate, assist the Client in securing facility financing.
 - D) Policies and Internal Controls
 - 1) Provide suggested policies and procedures for proper internal controls.
 - 2)
 - E) Other Audits/Reporting
 - 1) Assist other audits as appropriate including Workers Compensation, Special Education, After School Education & Safety, Federal Single audit, Office of Inspector General, IRS, etc.
 - 2) As appropriate, file property tax exemptions and provide sales and use tax reporting.
- 9) Infrastructure Set-Up (if applicable)
- A) County Office of Education Set-up
 - 1) Complete Charter School Application and collect all required documentation to submit to local county office of education. This includes collecting documentation for charter

- and employer tax status, drafting fiscal resolutions of the Board, and completing authorization forms.
- 2) Work with county office of education to set up the charter school as a pass through district and establish funding stream from District and the State.
- B) Revenue Enhancement Services
- 1) Assist in preparing Child Nutrition Application. Client is responsible for drafting and submitting.
 - 2) Prepare the Charter School Funding Survey and submit it by the required deadline.
- C) Human Resources
- 1) Apply for state employer identification numbers through the Employment Development Department.
- D) Accounting System
- 1) Set up Chart of Accounts in line with State Accounting Code Structure.
 - 2) Set up Internal Control Procedures and Fiscal Policies.
- E) Technical Assistance
- 1) Provide advice and recommendations on issues that may impact the fiscal soundness of the school, such as growth, matriculation, etc.
 - 2) Provide charter school industry vendor list.
 - 3) Provide support for strategic planning issues.
 - 1)

Coversheet

ExED CALPADS Contract

Section: V. Items Scheduled For Action
Item: G. ExED CALPADS Contract
Purpose: Vote
Submitted by:
Related Material: YPI Charter Schools - ExED CALPADS 2020-21.pdf

Schedule B:**ADDITIONAL SERVICES SCOPE OF WORK TO BE PERFORMED BY EXED**

This Schedule (the “Schedule”) is entered into as of the 30th day of June 2020 (the “Effective Date”). The Schedule outlines the additional services ExED will provide YPI Charter Schools, Inc (“Client”) as part of the Management and Accounting Services Agreement (the “Agreement”) that ExED and Client entered into on the 30th day of June 2020. The services identified in this Schedule include CALPADS Data Management and Data Reporting Support Services.

1. DEFINITIONS

- a. “CALPADS” means the California Longitudinal Pupil Achievement Data System. CALPADS is a longitudinal data system used to maintain individual-level data including student demographics, course data, discipline, assessments, staff assignments, and other data for state and federal reporting.
- b. “CBEDS” means California Basic Educational Data System. CBEDS data are reported through an Online Reporting Application called CBEDS-ORA. The purpose of CBEDS is to collect data about schools and districts, as well as some aggregate data on students and staff.
- c. “SEDS” means Special Education Data System or Systems. Special Education data is managed via Special Education information data systems that have been identified by Client’s SELPA (Special Education Local Plan Area). A SEDS allows centralized management of IEPs (Individualized Education Plans), Special Education data, CALPADS reporting, and service tracking. Examples of SEDS are: Welligent, SEIS (Special Education Information System) and SIRAS (SELPA Information and Records Analysis Support).
- d. All other defined terms used in this Schedule shall have the definitions stated in the Agreement.

2. CALPADS DATA MANAGEMENT AND DATA REPORTING SERVICES

- a. ORIENTATION. Provide orientation to CALPADS Support Services.
 - (i) Discuss CALPADS reporting requirements related to school funding.
 - (ii) Review goals for ExED and Client.
 - (iii) Review responsibilities of ExED and Client.
 - (iv) Client Responsibility
 - (1) Provide ExED with appropriate access to its SIS (Student Information System) application.
 - (2) Provide ExED Data Management Team Lead a CALPADS account with LEA Admin level access. LEA Admin account is the master account and allows for the creation of users and resetting of passwords.
 - (3) Provide ExED with a Designated Point Person to facilitate requests for records verification and collection in order to troubleshoot and clear errors

in CALPADS data or other systems for which CALPADS certification is dependent upon (e.g., Special Education Data Systems – SEDS)

- (4) Client staff will not directly change CALPADS data without first communicating to and coordinating with ExED.
 - (5) Client staff understands their responsibility to ensure compliance with the federal Family Educational Rights and Privacy Act (20 U.S.C. §1232g).
- b. **RESOURCES.** ExED will provide resources to Client-identified staff responsible for SIS, CALPADS, and data management in the following areas:
- (i) In workshop format, review data elements specific to CALPADS including Students, Staff, Courses, Discipline and Attendance.
 - (ii) Facilitate troubleshooting in SIS on issues specific to CALPADS.
 - (iii) Provide support via email, phone, remote assistance, and permitted in-person visits on issues specific to CALPADS.
 - (1) Phone support will be available during normal business hours.
 - (2) Email requests can be directed to ExED at: datamanagement@exed.org.
- c. **DATA INTEGRITY.** Assess and support data integrity for CALPADS-related data elements. ExED will:
- (i) Identify areas for improvement throughout our working partnership and offer guidance or resources for collecting and populating data to meet requirements.
 - (ii) Create and/or locate Statewide Student Identifiers (“SSIDs”) for new students enrolling at Client. ExED will complete this process as part of monthly attendance reporting.
 - (iii) Identify and communicate to Client any conflicting, missing and/or required data so as to comply with the CALPADS certification process. ExED will provide timelines, guidance, and instructions to Client to address missing and/or required data.
 - (iv) Support End of Year / Beginning of Year Rollover
 - (1) Provide guidance in managing the rollover process in SIS for academic year 2020-2021.
 - (2) Support set up of new academic terms in SIS and instruct Client on calendar set up for attendance or facilitate communication with SIS vendor for troubleshooting.
 - (v) Client responsibility.
 - (1) **Client is responsible for the integrity of their data.**
 - (2) Pupil records continue to be the property of and under the control of the Client.

- (3) Provide an overview to ExED of Client's data management structure and current processes for the collection, validation, and reporting of data.
- (4) Provide time for the appropriate staff to meet to review processes with ExED.
- (5) For all students who enroll and exit Client, Client is responsible to ensure enrollment is entered in the SIS in the correct grade-level within the first attendance reporting cycle of student's enrollment.
- (6) Client is responsible to notify ExED if enrolled students have a mid-year grade-level change once enrolled.
- (7) Client is responsible to notify District of Residence of exited student pursuant to Ed Code §47605(d)(3).
- (8) Client is responsible for completing any missing data and/or required data and entering the relevant data into Client's SIS or data entry templates as requested and within the timeframe established in the request for set up of Client's SIS system.
- (9) Client is responsible for follow-up with any data discrepancies and notifying ExED once resolved.
- (10) Client will provide ExED any requested 2020-2021 academic year dates and instructional calendar and notify ExED of any changes when they occur.
- (11) Client will provide ExED next year school and next year grade information for returning students, including any retained students as required in their SIS.
- (12) Client will identify and properly transfer out non-returning students in the SIS and SEDS.

d. DATA VALIDATION & CERTIFICATION. ExED will:

- (i) Validate and extract data from SIS and upload, review, and certify data in CALPADS as required, including:
 - (1) Prepare Fall 1 data.
 - (2) Prepare and certify Fall 2 data.
 - (3) Prepare and certify End of Year 1 data (as applicable)
 - (4) Prepare and certify End of Year 2 data.
 - (5) Prepare End of Year 3 data.
 - (6) Provide review of CALPADS data entered into Client SIS.
 - (7) Summarize key data for certification in CALPADS and secure Client sign-off and approval of CALPADS data prior to submitting for final approval and certification.

- (8) Manage CALPADS anomalies, including Multiple Identifiers (MID), Exit Reason Discrepancies (ERD), and Concurrent Enrollments (CCE), within the threshold given by CALPADS for successful certification.
 - (9) Provide Certified Reports for Client reference and archives.
 - (10) If Client requests CALPADS amendment window is utilized, ExED has the right to charge an additional fee. ExED will notify Client of the additional fees prior to beginning work.
 - (ii) **Data accuracy remains the responsibility of Client and is acknowledged upon signature of summary data provided by ExED.**
- e. COMMUNICATION. Measure and report progress. ExED will:
 - (i) Summarize key data required for certification in CALPADS to Client’s leaders and key staff
 - (ii) Navigate complex CALPADS requirements and stay up to date on frequently changing requirements.
 - (iii) Client Responsibility.
 - (1)
- f. ADDITIONAL REPORTING SUPPORT. ExED will:
 - (i) Provide support and guidance on reporting California Basic Educational Data System (“CBEDS”) data.
 - (1) Troubleshoot any issues with CBEDS extracts/data.
 - (2) Identify any discrepancies and anomalies with the CBEDS data in SIS, if applicable.
 - (3) Provide review of CBEDS data entered into Client SIS.
 - (4) Secure Client sign-off and approval of CBEDS data prior to final submission.
 - (ii) Client Responsibility.
 - (1) Client will provide CBEDS-ORA login information and return CBEDS SIF to ExED as requested and within the timeframe established in the request.

3. **PAYMENT AND TERMS**

- a. Fees and Charges.
 - (i) CALPADS Data Management and Data Reporting Support Services

- (1) Rate. Client will pay ExED a flat fee of \$33,750 for the 2020-21 school year for the CALPADS Data Management and Data Reporting Support Services and reimburse ExED for its actual, reasonable out-of-pocket expenses incurred in providing the services. These out-of-pocket expenses will not exceed \$150 per month without written authorization from Client.
- (2) Invoicing. ExED will invoice Client \$2,812.50 monthly from July 1st, 2020, through June 30, 2021, as well as for out-of-pocket expenses incurred not to exceed \$150 per month without written authorization from Client. ExED will automatically prepare a check on a monthly basis for ExED payment for execution by the person authorized by Client to execute such checks.

4. **CONFIDENTIALITY AND SECURITY**

- a. ExED will directly access Client's SIS system and will extract data required for CALPADS reporting. Such information shall be considered Confidential Information to the extent it contains any personally-identifiable information under FERPA.
- b. ExED will directly access student information using SIS as licensed to Client, and provide user technical support as well as develop reports, as reasonably requested by Client. Such information shall be considered Confidential Information to the extent it contains any personally-identifiable information under FERPA.
- c. ExED will directly access information regarding eligibility for student participation in free and reduced price meals programs. Such information shall be considered Confidential Information to the extent it contains any personally-identifiable information under FERPA.
- d. ExED may directly access information regarding Special Education eligibility programs and services if deemed necessary and acceptable. Such information shall be considered Confidential Information to the extent it contains any personally-identifiable information under FERPA.
- e. ExED may directly access staff employment data if deemed necessary and acceptable. Such information shall be considered Confidential Information to the extent it contains any personally-identifiable information.
- f. ExED will utilize software systems such as Citrix ShareFile and/or Box to share confidential student and staff information via a secured system rather than via individual emails.
- g. ExED will not use any information in the pupil record for any purpose other than those required or specifically permitted by this Schedule.
- h. ExED staff responsible for ensuring pupil records security and confidentiality will participate in FERPA training and designated PTAC trainings.
- i. Upon termination of this contract, should Client choose not to renew CALPADS Data Management and Data Reporting Services, ExED will transfer any data files containing pupil records to the Client via Box within 60 days of the termination of this contract.
- j. ExED will not share nor use personally identifiable information in pupil records to engage in targeted advertising.

5. **THE CLIENT'S OBLIGATIONS.**

- a. Authorized Personnel. The Board may identify to ExED, in writing, the Client Administrator and other staff member(s) authorized to work with ExED with respect to: CALPADS, SIS, and data management services. In the absence of such designated persons, ExED shall be authorized to communicate with any Client Administrator and the presiding officer of the Board.
- b. Principal Contact. The Board may also identify, in writing to ExED, its key or principal contact, if other than the Client Administrator, who is authorized to receive and disclose Confidential Information and approve CALPADS submissions; as well as an alternate contact in the event Client Administrator cannot or should not serve as Client's contact due to conflict or suspected misconduct. In the absence of such designated persons, any Client Administrator and the presiding officer of the Board shall have such authority.
- c. Access to State Systems. Client is responsible for maintaining master accounts with associated usernames and passwords for accessing the CALPADS state system, the CBEDS online reporting system, and any 3rd party systems (e.g. CAASPP/TOMS, CASEMIS, SEDS, Cal-SAAS).
- d. SIS Records. Client will maintain all data records in SIS. Client is responsible for maintaining the accuracy of Client's data records, correcting data errors, and entering new or corrected data. Client is solely responsible to ensure the accuracy of the data it provides to ExED or that is maintained in Client's SIS database. ExED has no responsibility to independently confirm the accuracy of the data it receives from Client or that is maintained in Client's SIS database. ExED will advise Client of the data to be corrected so as to comply with the CALPADS certification process and may provide data entry templates, but Client is responsible for correcting the errors or completing the missing data.
- e. Coordination and Cooperation. Client, the Client Administrator, authorized staff members and the principal contact will work closely and cooperatively with ExED to facilitate the effective performance and delivery of the Additional Services identified in this Schedule. Client will comply with and respond promptly to all reasonable requests of ExED to correct data errors and for information and documents from Client.

If Client does not meet timelines that ExED has established for making data corrections required for CALPADS certification, ExED will not be responsible if Client is unable to certify or if Client certifies with inaccurate data.

- f. Client Policies and Procedures. Client covenants to develop, apply and follow not less than customary and reasonable policies and procedures for a charter school applicable to data management, including, but not limited to: enrollment, attendance, eligibility for student participation in free and reduced price meals programs, and special education.
- g. Integrity. Client will act with integrity and alert the management of ExED to any fraudulent activity which is reasonably related to the Additional Services identified in this Schedule as soon as Client becomes aware, to the extent permitted by law. Client acknowledges that ExED's ability to provide these Additional Services is premised upon Client acting in a prudent manner.

6. OTHER PROVISIONS

- a. Other than the services outlined above in the section "Optional Enhanced Support Services" ExED is not responsible for any other activities, unless mutually agreed to in writing.

- b. All other terms, conditions, obligations, rights and provisions of the Agreement, including but not limited to limitation of liability and dispute resolution provisions, shall apply to all Additional Services identified in this Schedule.

7. **TERM AND TERMINATION EXPIRATION.**

This Schedule to provide Additional Services shall continue in full force and effect from July 1, 2020, until June 30, 2021.

- a. Termination for convenience. Either party may terminate this Schedule upon 30 days written notice to the other party, without cause. During the notice period, the parties shall cooperate to wind up and complete the pending work for the current month.
- b. Immediate termination for cause. ExED may immediately terminate the services outlined in this Schedule in the event it determines that it cannot provide the Services in a professional manner due to the actions or inaction of Client with respect to data management; in such event, ExED will cooperate with Client to transition its duties to Client personnel or another vendor.
- c. Failure to comply with the requirements of Ed Code 49073.1(a-b) shall render this contract void if, upon notice and a reasonable opportunity to cure, the noncompliant party fails to come into compliance and cure any defect. Written notice of noncompliance may be provided by any party to the contract. All parties subject to a contract voided under this subdivision shall return all pupil records in their possession to the local educational agency (Client).

IN WITNESS WHEREOF, the parties hereto execute this Schedule in counterparts as of the Effective Date through duly authorized representatives.

CLIENT:

By: _____ Dated: _____,

Name: Yvette King-Berg

Title: Executive Director

ExED:

By: _____ Dated: _____,

Name: Tait G. Anderson

Title: Executive Vice President