

# Youth Policy Institute Charter Schools (YPICS)

## YPICS Regular Board Meeting

---

### **Date and Time**

Monday June 26, 2023 at 6:00 PM PDT

### **Location**

The Meeting will be held at:

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101  
Granada Hills, CA 91344

The Public may also access the live stream of the meeting at any of the four (4) YPICS locations or via the Zoom link below: <https://us06web.zoom.us/j/3813681855>

***Presentations from the Public can only be made at one of the four YPICS locations listed.***

Bert Corona Charter School  
9400 Remick Avenue Pacoima, CA 91331

Bert Corona Charter High School  
12513 Gain Street Pacoima, CA 91331

Monseñor Oscar Romero Charter School  
2670 W. 11th Street Los Angeles, CA 90006

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101  
Granada Hills, CA 91344

---

## Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>6:00 PM</b>
Opening Items			
<b>A.</b> Record Attendance and Guests		Yesenia Zubia	
<b>B.</b> Call the Meeting to Order		Mary Keipp	
<b>C.</b> Additions/Corrections to Agenda		Mary Keipp	1 m
<b>D.</b> Approval of March 27, 2023 Regular Board Meeting Minutes	Approve Minutes		1 m
<b>E.</b> Approval of April 24, 2023 Regular Board Meeting Minutes	Approve Minutes		1 m
<b>F.</b> Approval of May 8, 2023 Regular Board Meeting Minutes	Approve Minutes		1 m
<b>G.</b> Approval of June 5, 2023 Regular Board Meeting Minutes	Approve Minutes		1 m
<b>II. Communications</b>			<b>6:05 PM</b>
<b>A.</b> Presentations from the Public	FYI	Mary Keipp	
<b>END OF STATE OF EMERGENCY AND NEW REMOTE PARTICIPATION RULES - Assembly Bill 2449</b>			
<p>Governor Newsom announced that the COVID-19 state of emergency ended on February 28, 2023. With the end of the state of emergency, agencies are no longer able to utilize pandemic-era virtual meeting procedures. However, board members may continue to participate remotely by telephone and/or videoconference under traditional Ralph M. Brown Act teleconference rules. Effective January 1, 2023, Assembly Bill 2449 (AB 2449) allows individual board members to participate in meetings remotely during "emergency circumstances" or for "just cause." Specific</p>			

Purpose	Presenter	Time
<p>requirements may be found in the full text of AB2449 (<a href="#">California Legislation Information</a>). All requirements for attendance by the YPICS Board of Trustees are adhered to in accordance with the Ralph M. Brown Act.</p>		

**Instructions for Presentations to the Board by Parents and Citizens**

YPICS (or the "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:

If you wish to make a public comment, you may attend in person and may complete a "Speaker Card" (on an agenda item or non-agenda item) card which will be available at the door.

When addressing the Board, speakers are requested (but not required) to state their name and address from the podium and adhere to the time limits set forth. Non-agenda items are limited to three (3) minutes and total time allotted to not exceed fifteen (15) minutes and Items on the agenda are limited to five (5) minutes.

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 on the Charter Schools website at [ypics.org](http://ypics.org) or 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.

YPICS 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](mailto:info@coronacharter.org), [info@romerocharter.org](mailto:info@romerocharter.org). All efforts will be made for reasonable accommodations.

**III. Items Scheduled for Information**

**6:05 PM**

	Purpose	Presenter	Time
<b>A. Board Committee Reports</b>	FYI		4 m
<ul style="list-style-type: none"> <li>1. Board Academic Committee update presented by Committee Chair, Cesar Lopez</li> <li>2. Board Finance Committee update presented by Committee Chair, Michael Green</li> <li>3. Board Technology Committee update presented by Committee Chair, Dean Cho</li> </ul>			
<b>B. School Committee/ Council Reports</b>	FYI		3 m
<b>C. Bert Corona Executive Administrator's Report</b>	FYI	Kevin Myers	2 m
<b>D. Monseñor Oscar Romero Charter School Interim Executive Administrator's Report</b>	FYI	Freddy Zepeda	2 m
<b>E. Bert Corona Charter High School/ COO's Report</b>	FYI	Ruben Duenas	2 m
<b>F. YPICS Executive Director's Report</b>	FYI	Yvette King-Berg	2 m
<b>G. YPICS Board of Director's Meeting</b>	Discuss	Yvette King-Berg	5 m

**IV. Consent Agenda Items 6:25 PM**

**A. Background**

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 1 m**

- 1. Recommendation to approve 23-24 Homeless Education Policies for BCCS, BCCHS, and MORCS.
- 2. Recommendation to renew accounting services with ExED.
- 3. Recommendation to continue membership in CharterSAFE for Workers' Compensation, Employer's Liability Coverage, and Property & Liability Insurance.
- 4. Recommendation to approve E-Rate Consulting Renewal Proposal for Fiscal Year 2023-2034 for Learningtech.org.



	Purpose	Presenter	Time
5.	Recommendation to approve continued membership in California Charter School Association.		
6.	Recommendation to approve revised YPICS Employee Handbook.		
7.	Recommendation to approve Board of Directors for 2023-2024.		
8.	Recommendation to approve continued membership in Charter Schools Development Center.		
9.	Recommendation to approve continuing use of existing Fiscal Policies and Procedures.		
10.	Recommendation to approve YPICS EI Master Plan for Monseñor Oscar Romero Charter School.		
11.	Recommendation to approve the 23-24 agreements.		

**V. Items Scheduled For Action 6:26 PM**

<b>A.</b>	Recommendation to approve the Employer Retention Tax Credit Retainer Agreement	Vote	Yvette King-Berg	2 m
	This is a recommendation to approve the Employer Retention Tax Credit retainer agreement at a 8% contingency fee with CFOMW Tax, LLC.			
<b>B.</b>	Recommendation to approve Expenditures Above the Executive Director's Spending Authority	Vote	Yvette King-Berg	2 m
	This is a recommendation to approve storage bin removal services from Greenworks totaling \$56,520 for Bert Corona Charter School.			
<b>C.</b>	Recommendation to approve the 2023-2024 Local Control and Accountability Plans for BCCS, MORCS, and BCCHS	Vote	Yvette King-Berg	5 m
	This is a recommendation to approve the 23-24 LCAPS for Bert Corona Charter School, Monseñor Oscar Romero Charter School and Bert Corona Charter High School.			
<b>D.</b>	Recommendation to approve the Local Indicators for California School Dashboard for BCCS, MORCS, and BCCHS	Vote	Yvette King-Berg	5 m
	This is a recommendation to approve the Local Indicators for the California School Dashboard for Bert Corona Charter School, Monseñor Oscar Romero Charter School and Bert Corona Charter High School.			
<b>E.</b>	Recommendation to Ratify the Preliminary 2023-2024 Budgets	Vote	Irina Castillo	2 m

	Purpose	Presenter	Time	
<b>F.</b>	Recommendation to approve the YPICS Budgets for 2023-2024	Vote	Irina Castillo	10 m
	This is a recommendation to approve budgets for Bert Corona Charter School, Monseñor Oscar Romero Charter School, and Bert Corona Charter High School.			
<b>G.</b>	Recommendation to approve the Education Protection Act Spending Resolutions for 2023-2024	Vote	Ryan Bradford	2 m
	This is a recommendation to approve the EPA spending resolutions.			
<b>H.</b>	Recommendation to approve services with Ring Central	Vote	Ryan Bradford	2 m
	This is a recommendation to approve a 5-year agreement for VOIP services with Ring Central			
<b>I.</b>	Recommendation to Approve Hourly Staff Pay Schedule and Administrative Team Salary Table	Vote	Yvette King-Berg	2 m
	This is a recommendation to approve a hourly staff pay schedule and an administrative team salary table.			
<b>J.</b>	Recommendation to Approve Board Resolution to Renew MORCS	Vote	Yvette King-Berg	2 m
	This is a recommendation to approve renewing Monseñor Oscar Romero Charter School.			
<b>K.</b>	Recommendation to Return 6M to PWB, Place 3M into Sweep Account and 3M into a 13-month CD	Vote	Yvette King-Berg	2 m
	This is a recommendation to return 6 million to PWB; place 3 million into sweep account and 3 million into a 13-month CD earning 5.5%			
<b>L.</b>	Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter School	Vote	Yvette King-Berg	1 m
	This is a recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter School.			
<b>M.</b>	Recommendation to approve the 23-24 Declaration of Need for Monseñor Oscar Romero Charter School	Vote	Yvette King-Berg	1 m

	Purpose	Presenter	Time
	This is a recommendation to approve the 23-24 Declaration of Need for Monseñor Oscar Romero Charter School.		
<b>N.</b>	Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter High School	Vote	Yvette King-Berg 1 m
	This is a recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter High School.		
<b>O.</b>	Recommendation to Approve Local Assignment Option EC 44256 (b) for Christina Luc		5 m
	This is a recommendation to approve a Local Assignment Option for Christina Luc, SEID 7698313090, a clear multiple subject credential holder to teach math at Bert Corona Charter School for the 2023-2024 school year per the California EC 44256 (b).		
<b>VI.</b>	<b>Announcements</b>		<b>7:10 PM</b>
<b>A.</b>	Closing Announcements	FYI	Yvette King-Berg 2 m
	The next board meeting will be held on Monday, July 17, 2023 at the Learning and Support Center.		
<b>VII.</b>	<b>Closing Items</b>		<b>7:12 PM</b>
<b>A.</b>	Adjourn Meeting	Vote	Mary Keipp

# Coversheet

## Approval of March 27, 2023 Regular Board Meeting Minutes

**Section:** I. Opening Items  
**Item:** D. Approval of March 27, 2023 Regular Board Meeting Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for YPICS Regular Board Meeting on March 27, 2023

APPROVED

# Youth Policy Institute Charter Schools (YPICS)

## Minutes

### YPICS Regular Board Meeting

---

#### **Date and Time**

Monday March 27, 2023 at 6:00 PM

#### **Location**

Meeting will be held at:

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101  
Granada Hills, CA 91344

The Public may access the live stream of the meeting at the campuses listed below:

#### **Bert Corona Charter School**

9400 Remick Avenue  
Pacoima, CA 91331

#### **Bert Corona High School**

12513 Gain Street  
Pacoima, CA 91331

#### **Monsenor Oscar Romero Charter School**

2670 W. 11th Street  
Los Angeles, CA 90006

<https://us06web.zoom.us/j/88358250414>

Meeting ID: 883 5825 0414

One tap mobile

+16699006833,,82269980929# US (San Jose)

+16694449171,,82269980929# US

Dial by your location

+1 669 900 6833 US (San Jose)

+1 669 444 9171 US

---

+1 719 359 4580 US  
+1 253 205 0468 US  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
+1 564 217 2000 US  
+1 646 931 3860 US  
+1 689 278 1000 US  
+1 929 205 6099 US (New York)  
+1 301 715 8592 US (Washington DC)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US

Meeting ID: 822 6998 0929

---

#### **Trustees Present**

C. Lopez, D. Cho, M. Green, M. Keipp

#### **Trustees Absent**

S. Mendoza, W. Njboke

#### **Guests Present**

Berenice Vidana, Brett Walter, Christina Luc, Diana Gamez, F. Zepeda (remote), I. Castillo, Jose Sepulveda, K. Myers (remote), Kim Pistilli, Maria Contreras, Maribel Chairez, Mireya Hernandez, R. Duenas, Susan Castellon, Y. King-Berg, 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 Mar 27, 2023 at 6:11 PM.

#### **C. Additions/Corrections to Agenda**

The Board made a motion to re-order the agenda.

C. Lopez made a motion to Move action item D to proceeding the presentations from the public.

M. Green seconded the motion.

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

**Roll Call**

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

**D. Approval of February 6, 2023 Regular Board Meeting Minutes**

C. Lopez made a motion to approve the minutes from YPICS Regular Board Meeting on 02-06-23.

M. Green seconded the motion.

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

**Roll Call**

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

**II. Communications**

**A. Presentations from the Public**

A staff member, Brett Walter, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Brett Walter opposed the current policy requiring anyone on campuses to wear masks at all times and spoke about making masking optional for all.

A staff member, Maria Contreras, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Maria Contreras opposes the current policy requiring anyone on campuses to wear masks at all times and would like covers not to be required outside.

Christina Luc, a staff member, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Christina Luc opposes the current policy requiring anyone on campuses to wear masks at all times and would like marks to be optional outside and inside.

A staff member, Kim Pistilli, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Kim Pistilli opposes the current policy requiring anyone on campuses to wear masks at all times and would like not to have masking.

Jose Sepulveda, a staff member, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Jose Sepulveda opposes the current policy requiring anyone on campuses to wear masks at all times and favors making masks optional for all outside.

Mireya Hernandez, a parent, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Mireya Hernandez opposes the current policy requiring anyone on campuses to wear masks at all times and would like not to have masking.

Maribel Chairez, a parent, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Mireya Hernandez opposes the current policy requiring anyone on campuses to wear masks at all times and would like masks to be optional.

A staff member, Berenice Vidana, spoke on agenda topic Section V. Item D, COVID Safety Protocols. Berenice Vidana opposes the current policy requiring anyone on campuses to wear masks at all times and would like masks to be required at the schools.

Board Chair Keipp directed the Executive Director to complete the survey of all schools and all stakeholders; she made it clear that she wanted to hear from all stakeholders, not just one, and provide that data, along with the LA County Department of Public Health & CA Department of Public Health updated guidance for the regularly scheduled board meeting in April.

### III. Items Scheduled for Information

#### A. School Committee/ Council Reports

Each month school 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

##### Academic Excellence Committee

Academic Chair, Board Vice-Chair Lopez reminded the board that at the November Board retreat that in addition to equity for all students, "every day, every student access to grade level work and assignments," the data indicated that YPICS needs to focus on ensuring that Math and EL data is targeted and tracked. In January, we were able to review action steps taken before the mid-year assessments and results. **Action taken:** students were provided and reviewed their BOY test results and were directed and coached to set a goal for the mid-year assessments. In the second semester, the schools created support and acceleration blocks during, before, and after school. The high school purchased additional support materials to build the necessary foundation in math to succeed in math achievement. **Impact:** Upon reviewing the mid-year assessment results, all three schools are on track to meet the 50% of students increased by a year of instruction based on i-Ready and NWEA Maps verifiable data.



### **Finance Committee**

Finance Committee Chair, Board Treasurer Michael Green reported that the committee met on March 20th. The committee reviewed the current financials for the entire board meeting on March 27th. Additionally, the committee reviewed the tax return form 990. The committee's focus is planning and preparing for next year's budget. Staff will begin to engage all stakeholders in the process. The committee plans to meet in May after the school's oversight visits in April.

### **Technology Committee**

Technology Committee Chair Cho reported that the committee met and is working on the e-rate plan and other items focused on cyber-security. There will be more to report at the next meeting in April.

## **C. Senior Director of Community School Partnerships' Report**

In 2022 each YPICS school was awarded a California Community Schools Partnership Program Planning Grant. Total funding per school of \$200,000 supported with hiring 3 Coordinators of Community Schools (CoCS), contract services for data analyses, teachers/staff stipends, parent capacity development, and teacher/staff professional development.

To address the needs of our community school, each school undertook a comprehensive community school planning process that included asset mapping, a needs assessment and gap analysis, and a heavy emphasis on engagement with and leadership by the school community, including students, families, staff, partners, and area residents. Upon being awarded the planning grant, each school site hired a Coordinator of Community School (CoCS); they quickly became essential to school operations and spearheaded planning activities. School Community engagement kicked off in August 2022 with an overview of the CA community school framework and the YPICS vision for its community school to teachers and staff during the beginning of the school year professional development days. They were followed by parent-teacher conferences, workshops, and community events during September - December 2022. CoCS introduced the community school framework to parents during parent-teacher meetings, providing an overview of the assets and needs assessment work ahead. In October and November, families were engaged via annual events like Trunk-or-Treat, Día De Los Muertos, and College & Career Parent workshops.

Community school needs assessment activities occurred throughout the year. These included YouthTruth Survey and Focus Groups with stakeholders. In-person focus groups were conducted with students, teachers, and families at each school across grade levels and positions (instructional and supportive staff) to gain a more holistic understanding of the strengths and challenges of our school. Key Informational Interviews with staff and teachers and in-person interviews were conducted with school administrators and

teachers to assess successes and challenges with the school culture and the range of services offered. Focus groups explored what makes them feel welcome/unwelcome on campus, their vision for a "community school," if they feel engaged in decision-making, how the school can build more trusting relationships, and what support services are needed.

Community school needs assessment activities occurred throughout the year. These included YouthTruth Survey and Focus Groups with stakeholders. In-person focus groups were conducted with students, teachers, and families at each school across grade levels and positions (instructional and supportive staff) to gain a more holistic understanding of the strengths and challenges of our school. Key Informational Interviews with staff and teachers and in-person interviews were conducted with school administrators and teachers to assess successes and challenges with the school culture and the range of services offered. Focus groups explored what makes them feel welcome/unwelcome on campus, their vision for a "community school," if they feel engaged in decision-making, how the school can build more trusting relationships, and what support services are needed.

This planning process prepared YPICS to submit a comprehensive CCSP implementation grant application on March 21, 2023. The application included our three schools: Bert Corona Charter School, Monsenor Oscar Romero Charter School, and Bert Corona Charter High School. If funded, we will be awarded \$1,187,500 per school - \$3,562,500 for five years. This funding will support improving internal systems and increase alignment to the four Pillars of Community Schools: Integrated Student Support, Family and Community Engagement, Collaborative Leadership and Practices for Educators and Administrators, and; Extended Learning Time and Opportunities. Will also improve Cornerstone Commitments of Community Schools: A commitment to asset-driven and strength-based practice; A commitment to racially just and restorative school climates; robust, culturally proficient, and relevant instruction; and a commitment to shared decision-making and participatory approaches.

#### **D. Bert Corona Executive Administrator's Report**

**Enrollment, Attendance, Homeless Youth:** Currently, our enrollment is at 335. This year, we partnered with a local homeless shelter for women and children to enroll 10 homeless youth, and we are learning more and more about how to support this population. This population has been extremely transient, with several students enrolling and then disenrolling a few weeks later, and a few students enrolling, leaving, and coming back. However, the staff at Hope Gardens Shelter are extremely grateful for our partnership and support. We have been able to connect them with other services and partners that are helping to improve their quality of life and are helping meet their regular needs. We are currently over our enrollment goal by 14 students.

**DEI Committee:** In the early months of the school year, we had some pretty significant issues with cursing, demeaning language, and the use of racial slurs. While it is normal to hear this kind of language occasionally at a school, the use in our 8th grade class, in particular, was frequent, brash, and blatant. Over the course of the first semester we implemented many interventions, lessons and supports to address this issue, including small group intervention, parent meetings, LAPD Diversion sessions, small group counseling, individual counseling, Ripple Effects lessons, and class presentations. Teachers taught the history of racial slurs and the current impact on our society, and retaught expectations. We came together frequently as a team to discuss our impact and how to continue working with our students. Although things are not perfect now, they have improved markedly and we are pleased with the impact we were able to have through our efforts.

We decided to call the committee SHIELD so we could also incorporate some of our YPICS values into our efforts. SHIELD (in addition to being a cool Marvel connection) stands for Serving Humanity (through) Inclusion, Equity, Leadership, and Diversity. Our committee just completed writing a series of lessons for advisory that our teachers will teach April 11 through 18; each lesson will focus on an element of SHIELD (e.g., service, leadership, equity, etc.) and the culminating project lesson will have students summarize what they have learned. Once the lessons have been taught, our next step will be to bring students and parents to join our meetings once per month. The intent is to make sure Equity, Diversity, and Inclusion are a focus across the school and community

**Current Areas of Focus and Updates:** In January, our YPICS leadership team had the opportunity to participate in a facilitated data walk and discussion. This process was very helpful for our team in identifying key areas of strength and weakness and where we needed to focus as a school. At the end of the process, our team identified three YPICS-aligned areas of focus for BCCS: EL reclassification and performance, Restorative Practices as a Tier I approach, and Chronic Absenteeism. Our leadership team started a planning and monitoring cycle where we set small goals and reflect each week. Each team developed SMART goals that we could monitor along with action steps that would help them meet their goals. Each Monday we check in on progress, and I discuss these goals with admin/department leads at our weekly one-on-one meetings. Goals and areas of focus are listed below. For team accountability, we assess each week whether each team made progress, made a plan (documented), or did not address their goals

## **E. Monseñor Oscar Romero's Interim Executive Administrator's Report**

### **Overview:**

MORCS is well into Semester 2, and our students and teachers have continued working hard to improve academic performance. Our teachers and students have worked hard to fill learning gaps and provide necessary interventions to help students meet their growth goals. Many supports and interventions are taking place in Support Classes where

teachers can work with students identified as needing support in a specific content area. Based on diagnostic scores and teacher recommendations, students have been placed in support classes (ex., Math Support, English Support). As a result, we are seeing growth in all grade levels and content areas. Some grade levels have seen faster growth, while others are only seeing slight growth. Still, our team continues to work hard to provide the necessary academic interventions to help students progress to reach grade-level mastery. Here are some updates regarding our academic growth:

### **Academic Focus**

i-Ready Diagnostic Growth Our team has been working on improving our diagnostic scores. Efforts include Goal Setting and Planning (PD in January) to target specific students; Increased usage of the iReady Personalized Instruction component to help close student gaps in learning; Incentives to increase use and engagement of iReady (field trips); Data Protocols to share and discuss what teachers are doing with students to help improve in academic areas. Our following diagnostic will take place when we return from Spring Break. This will wrap up our third and final diagnostic of the year. **We aim to have at least 51% of our students meet their typical growth goals in each subject area.**

### **Students meeting Typical Growth Goal**

The following data points outline the number of students who have met their Typical Growth goal. Typical Growth is the average annual growth for a student at this grade and baseline placement level.

#### **Reading**

- 6th Reading - 49% of students have met their typical growth; 43% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)
- 7th Reading - 37% of students have met their typical growth; 42% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)
- 8th Reading - 44% of students have met their typical growth; 47% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)

#### **Math**

- 6th Math - 32% of students have met their typical growth; 40% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)
- 7th Math - 38% of students have met their typical growth; 48% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)
- 8th Math - 42% of students have met their typical growth; 46% of students have improved at least 1 level in the placement band (ex. Moving from level 5 to level 6)

#### **Diagnostic Growth**

The following data sets outline the growth we have seen as measured by the iReady diagnostic.

Schoolwide Reading - we have seen improvement across the different placement distribution bands in Reading. Growth and improvement can be seen on the different placement levels as follows:

- At or above grade level: Start of the year - 12%; Current - 17%
- Three or more grade levels below: Start of the year - 61%; Current - 48%

Schoolwide Math - We have seen similar growth in Mathematics. Growth and improvement can be seen on the different placement levels as follows:

- At or above grade level: Start of the year - 5%; Current - 10%
- Three or more grade levels below: Start of the year - 54%; Current - 44%
- One grade level below: Start of the year - 21%; Current - 27%

## **F. Chief Operation Officer/ BCCHS Interim EA Report**

### **Interim Executive Administrator- Bert Corona Charter High School Instruction**

Staff is exploring a new bell schedule for the 23-24 school year which would reduce the length of our block periods from 80 minutes to 70 minutes and passing periods from 10 minutes to 5 minutes. By making these changes, the schedule would allow for an additional period to be added for 55 to 60 minutes at the end of the day. This additional period would allow more options and flexibility in programming student schedules. Additional offerings include sports and electives like yearbook, dance, and music. Seniors (12 Graders) could also participate in semester-long internships with local businesses, schools, and community-based organizations.

### **College Ready College Visits**

10th graders visited UC Santa Barbara on March 2, 2023. Students were taken on a campus tour, walked on the beach, and had lunch at Woodstock's Pizza. Staff is planning a trip for 9th graders to visit UC Irvine. 11th graders will be taking a three-day trip to visit colleges in Northern California on April 12 - April 14, 2023.

### **College Application Process**

Thirty-three seniors have applied to 4 year public and private colleges and universities. Thirty-three seniors completed the FAFSA. Students are receiving acceptance letters, and we will report more details next month. We have acceptance letters from all the CSUs, UC Riverside, UC San Diego, and UC Davis.

### **Operations Facilities**

On March 2, 2023, the LA County Office of Education staff conducted the Williams Facility Inspection. The school received a score of 90.74 which is rated as good. Staff pointed out corrections/repairs that need to be made to the County Representative.

### **Outreach and Recruitment**

On August 9, 2022, we expected to have 207 students enrolled on the first day of school. We had budgeted for 214 students. By October 26, 2023, our enrollment dropped to 200

or 14 students below our budgeted enrollment. Today we have 209 students enrolled, five below our target enrollment. Current outreach for students continues, and we are getting better numbers out of our work with Schola, a company supporting YPICS doing outreach. The HS operation team works hard and collaborates well with the Schola Team. Schola came out to BCCHS and made a video about the school. We are still waiting for a final copy of the video. We currently have 171 students registered for the 23-24 school year. Typically more students enroll at BCCHS between April and July. 11 students came to BCCHS through Schola. Last year, we only had 1 student enroll at BCCHS because of Schola Outreach.

### **Culture and Climate**

Senior activities are expensive. However, BCCHS prices are not as expensive as other schools around us. Staff is working to minimize costs and fundraise as much as possible.

### Community Schools

BCCHS submitted the California Community Schools Partnership Program Implementation Grant with YPICS. The grant focuses on:

- Integrated support services;
- Family and community engagement;
- Collaborative leadership and practices for educators and administrators; and
- Extended learning time and opportunities.

Based on the work supported by the planning grant. BCCHS staff, parents, and students will work on the following goals by supporting and enhancing the school's Multi-Tiered System of Support: 1: Increase student achievement and engagement 2: Increase Work readiness/job training 3: Increase College awareness and college visits for students and parents 4: Increase Mental health services and social-emotional and behavioral support 5: Reduce absenteeism and chronic absenteeism

### Chief Operations Officer Community Schools

YPICS submitted the California Community Schools Partnership Program Implementation Grant as one entity with three sites. Based on the grant guidelines, We request \$750,000 in total or \$250,000 per site. Each school has different goals based on each community's specific needs. However, each school will address the stated needs by supporting and enhancing the school's Multi-Tiered System of Support. Professional Development 11 YPICS staff members attended the California Charter School Conference in Sacramento from March 13 to March 16. The diversity of workshops was much greater than in the past few years. One of the keynote speakers, José M. Hernández, an American engineer and former NASA astronaut, impacted staff. His story of perseverance and family was highly motivating.

## **G.**

## Executive Director's Report

State Revenues Shy of Governor's January Estimates  
From School Services of California  
Posted February 22, 2023

In its latest monthly revenue bulletin, the Department of Finance (DOF) reports that state revenues for the 2022-23 fiscal year are currently \$3.3 billion below Governor Gavin Newsom's estimates from just a month ago when he released his 2023-24 State Budget proposal. The DOF explains that poor revenue performance is due to unexpected shortfalls in cash collections for the last two months, with January 2023 revenues coming in \$2 billion below estimates and December 2022 cash receipts \$1.3 billion below projections. Both corporation tax (CT) and personal income tax (PIT) revenues for January fell below the Governor's Budget estimates, while sales and use tax revenues performed modestly better than expected last month. Weaknesses in PIT and CT collections resulted from the confluence of tax policies affecting anticipated payments paid by businesses that individual filers could then use as personal tax credits and the timing of Internal Revenue Service filing deadlines.

**Proposition 98 Minimum Guarantee and Reserve** This acknowledgment lends credence to the Legislative Analyst's Office projection that there is an 80% chance that revenues for the fiscal year 2022-23 will be approximately \$5 billion lower than the Governor's January estimates by the time the Legislature adopts the 2023-24 State Budget. The fiscal year-to-date shortfall would result in an approximate \$1.3 billion reduction in the Proposition 98 minimum guarantee, while a \$5 billion shortfall would further reduce K-14 funding by another \$700 million. The prospect of further reductions to the Proposition 98 minimum guarantee raises questions about the ability of state lawmakers to use the Proposition 98 reserve to maintain current education investments and pay for additional costs associated with a cost-of-living adjustment. Currently, the reserve balance is estimated to be \$8.5 billion. This means that the constitutional condition for a reserve withdrawal is not met. If the Governor declares a budget emergency, the Legislature is authorized to withdraw from the Proposition 98 reserve and allocate those resources for any educational priority. The Governor has not signaled his willingness to declare a budget emergency, and it may be too soon to tell if his January estimates will uphold, given tax collection uncertainties from the extended tax filing deadlines.

**Personnel COVID-19 Paid Sick Leave Policy Expiration** Throughout the pandemic, YPI Charter Public Schools has aligned its policies with local and state regulations to comply with the law and to reduce the transmission of COVID-19 among students, staff, and surrounding communities. On December 31, 2022, California's COVID-19 Supplemental Paid Sick Leave (SPSL) ended. The 2022 COVID-19 Supplemental Paid Sick Leave provided for two separate banks of leaves, each of up to 40 hours. The first bank of COVID-19 Supplemental Paid Sick Leave, up to 40 hours, was available to covered employees unable to work to 1) care for themselves due to quarantine, isolation, or symptoms of COVID-19, 2) care for



a family member quarantine isolation, or symptoms of COVID-19 3) care for themselves due to vaccine-related side effects. The second bank of COVID-19 Supplemental Paid Sick Leave, up to 40 hours, was available only if an employee or a family member for whom they are providing care tested positive for COVID-19. Additionally, California Occupational Safety and Health (Cal/OSHA) adopted new COVID-19 Prevention Non-Emergency Regulations on February 3, 2023, which eliminated the employer mandate to provide COVID-19 exclusion pay to employees as stipulated in the Emergency Temporary Standard (ETS). Similarly, COVID-19 State of Emergency declarations for California and for the City.

Effective March 27, 2023, YPI Charter Schools employees will use paid sick leave (for part-time or temporary employees), accrued sick leave, or vacation time (regular and probationary full-time employees) for illnesses. The policy (ratified on February 6, 2023) that granted paid time off up to 10 days for quarantine or isolation due to the COVID-19 global pandemic will expire on March 27, 2023, and will not be extended. Please see the YPICS Employee Handbook for more information on sick leave. The Executive Director and COO will continue to monitor this closely.

**Compliance Statement of Interest - Form 700 Document** A statement of Economic Interest (Form 700) is a state form on which state and local government officials publicly disclose their assets and income that may be materially affected by their official acts. Agency employees, including some public officials designated in a conflict-of-interest code, must disclose particular financial interests according to the disclosure categories assigned to that position in their agency's conflict-of-interest code. Certain public officials, including public officials who manage public investments, must disclose all financial interests. These officials make full economic disclosure by state law rather than their agency's conflict of interest code. Members of Charter Schools are public officials and must file form 700. Initially, YPICS required all staff actively participating in the school's governance and leadership structure to complete Form 700. All other personnel needed will receive an email from DocuSign to complete the form on Friday, March 3, 2023. Form 700 documents must be completed and returned by March 24, 2023.

**Expanded Learning** The Expanded Learning Opportunities Program (ELO-P) funds after-school and summer enrichment programs for transitional kindergarten (TK) through sixth grade. "Expanded learning" means before-school, after-school, summer, or intersession learning programs that focus on developing pupils' academic, social, emotional, and physical needs and interests through hands-on, engaging learning experiences. Expanded learning programs are pupil-centered; results-driven; include community partners; and complement, but do not replicate, learning activities in the regular school day and school year. Next year, schools will receive an audit finding if the ELO-P is not implemented and if funds are not spent. The proposed legislation contains dozens of other changes. Most are technical, but more substantive ones of interest to charter schools include the following:

- Clarifies penalties for not offering Expanded Learning under the state's new Expanded Learning Opportunities Program (ELOP).



- It would clarify the interaction of penalties for (1) failing to serve eligible students and (2) failing to operate the program for all the required hours or days. The law would call for pro-rata penalties based on the proportion of eligible students not served. Any additional penalties for failing to operate the program for the required number of hours or days would be assessed after the first type of penalty is set (if any) and would reduce funding by 0.0049 times the number of days a charter school failed to meet the daily/hourly offering requirement.

YPICS provides students various engaging programs, clubs, field trips, assemblies, and special events. We are excited to provide our students with multiple possibilities and exciting opportunities.

### **Charter Renewals**

Under Education Code Section 47607.4, all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, shall have their term extended by two years. Given this extension, Monseñor Oscar Romero Charter School is up for the renewal of its petition. YPICS is working with Janelle Ruley of Young, Minney & Corr to ensure our charter petition complies and is ready for submission in July. As of March 23, 2023, LAUSD has not released guidelines for submitting charter renewals.

### **LAUSD Oversight Visits**

LAUSD Oversight visits are scheduled for the dates listed below:

Monseñor Oscar Romero Charter School - Thursday, April 13, 2023

Bert Corona Charter School - Tuesday, April 18, 2023

Bert Corona Charter High School - Friday, April 28, 2023.

## **H. YPICS Instructional Update**

## **IV. Consent Agenda Items**

### **A. Background**

### **B. Consent Items**

M. Green made a motion to approve the consent agenda items.

C. Lopez seconded the motion.

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

#### **Roll Call**

D. Cho Aye

W. Njboke Absent

M. Green Aye

M. Keipp Aye

S. Mendoza Absent

C. Lopez Aye

## V. Items Scheduled For Action

### A. YPICS February 2023 Financials and Check Registers

C. Lopez made a motion to approve the YPICS February 2023 financials and check registers as submitted.

D. Cho seconded the motion.

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

#### Roll Call

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

### B. YPICS FY 21-22 Tax Returns

M. Green made a motion to approve the YPICS FY21-22 990 tax return.

C. Lopez seconded the motion.

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

#### Roll Call

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

### C. MORCS SFA Procurement Process for Selection of School Meal Provider

C. Lopez made a motion to approve the MORCS SFA procurement process for the selection of a school meal provider.

D. Cho seconded the motion.

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

#### Roll Call

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

### D. YPICS COVID-19 Safety Protocols

M. Green made a motion to update the COVID-19 protocols to make masking optional while outside and continue with required masking indoors.

D. Cho seconded the motion.

The Board has requested all stakeholders at all YPICS sites be surveyed on their masking stance while on school campuses and the Board will revisit this policy at the next regular board meeting to make an updated decision based on the survey results received.

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

**Roll Call**

W. Njboke Absent

C. Lopez Aye

S. Mendoza Absent

D. Cho Aye

M. Green Aye

M. Keipp Aye

**E. Expenditures Above Spending Authority of the Executive Director.**

M. Green made a motion to approve the contracts with National School Reform.

D. Cho seconded the motion.

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

**Roll Call**

D. Cho Aye

M. Green Aye

W. Njboke Absent

M. Keipp Aye

S. Mendoza Absent

C. Lopez Aye

**VI. Announcements**

**A. Closing Announcements**

The next regular board meeting will be held at the Learning and Support Center on April 24, 2023.

**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 7:50 PM.

Respectfully Submitted,

Y. Zubia

# Coversheet

## Approval of April 24, 2023 Regular Board Meeting Minutes

<b>Section:</b>	I. Opening Items
<b>Item:</b>	E. Approval of April 24, 2023 Regular Board Meeting Minutes
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for YPICS Regular Board Meeting on April 24, 2023

APPROVED

# Youth Policy Institute Charter Schools (YPICS)

## Minutes

### YPICS Regular Board Meeting

---

#### **Date and Time**

Monday April 24, 2023 at 6:00 PM

#### **Location**

The meeting will be held at:

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101,  
Granada Hills, CA 91344

The Public may also access the live stream of the meeting and make presentations to the Board from our campus locations listed below.

#### **Bert Corona Charter School**

9400 Remick Avenue  
Pacoima, CA 91331

#### **Bert Corona Charter High School**

12513 Gain Street  
Pacoima, CA 91331

#### **Monseñor Oscar Romero Charter School**

2670 W. 11th Street  
Los Angeles, CA 90006

---

#### **Trustees Present**

C. Lopez, D. Cho, M. Green, M. Keipp

#### **Trustees Absent**

S. Mendoza, W. Njboke

#### **Guests Present**

---

I. Castillo, K. Myers (remote), R. Bradford, R. Duenas (remote), Y. King-Berg, 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 24, 2023 at 6:09 PM.

### C. Additions/Corrections to Agenda

There were no additions or corrections to the agenda.

## II. Communications

### A. Presentations from the Public

There were no presentations from the Public.

## III. Items Scheduled for Information

### A. Board Committee Reports

**Academic Committee** Chair Cesar Lopez reported that the Committee met the week before to discuss verifiable data and its role in renewing the schools. Additionally, he explained the CDE Data Dashboards, what they mean, and what impact they will have on schools in the future. Board Chair Keipp asked Chair Lopez to explain AB1505 briefly. He provided an overview that encouraged the schools to continue pushing and striving toward academic excellence. The data tracking is working, as evidenced by more than 50% of students growing more than one year in Math and ELA. The schools are also engaging students struggling with before and after-school programming to help close the gaps. The other encouraging data set is looking at how many students originally placed at 3+ years and below are moving up in placement levels. The schools are on target to decrease the lowest-scoring band by 20% or more.

**Finance Committee** Chair, Michael Green reported the Committee met on March 27th to review the 990 tax form, health benefits, and the teacher salary table.

**Technology Committee** Chair Dean Cho reported his committee will be meeting on April 26th.

### B.

## **School Committee/ Council Reports**

Each month school 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.

### **C. Bert Corona Executive Administrator's Report**

Academic Strategies to Improve Academic Outcomes:

To start our school year, we reviewed academic data and performance from last year, then followed that up with an analysis of our iReady diagnostic baseline data from the August administration of that assessment in math and reading. Using this information, we made plans to support student learning and growth.

#### **EL Supports and Schedule**

One of the under-performing populations from our 21-22 data set and on our initial diagnostic in the 22-23 school year was our EL population. The primary support we added for this group was the addition of an ELD teacher and a tutor for this school year. During the fall semester, this teacher supported students and teachers through push-in and pull-out support, much like a resource teacher does throughout the school year 45 minutes were designated for students but through a push-in-and pull-out model. This was a success regarding student growth, our second diagnostic in December, and our review of our Houghton Mifflin Reading Inventory data from the first semester. However, after discussing the data with our team, we determined that more targeted support was needed. As a result, we changed our schedule for the second semester to allow our ELs to have their regular, core ELA course and an ELD time explicitly designated for grouped language development instruction. With the new schedule, our EL teacher can teach the ELD courses' first three periods of the day, then provide support for the rest of the day in the classroom and through pull-out time for ELs. Moreover, the EL teacher provides instruction in the resource classrooms and our resource teachers co-teach with her once or twice a week. This provides much more time for support for our ELs and students who are both EL and SPED. In addition to the support our ELD teacher provides to our students, she also provides support and professional development for our staff. She has led several trainings on best practices to support ELs in the general education setting this year. She works with teachers one-on-one to help them plan instruction that will be meaningful and beneficial for our English learners.

**Acceleration and Study Hall:** Another strategy we used to support academic growth was identifying students for acceleration courses and study hall before and after school to provide additional support for growth. We currently have six credentialed teachers teaching, providing academic support and lessons before or after school, and five credentialed staff members (admin and teachers) facilitating study hall after school. For the acceleration courses, students were targeted if they were performing 1-2 grade levels below their diagnostic assessments in August or in December. These teachers teach

lessons targeted explicitly at learning gaps identified in their classroom assessments and by the iReady diagnostic (math and reading). The study hall is focused on iReady pathway completion and re-do mastery assignments. Students were targeted for study hall if they were on academic contract (more than one F) and/or were not completing at least two iReady lessons weekly. Our credentialed staff members can meet with students in these small-group settings to provide growth feedback and encourage students to progress on their iReady lessons. Often, when students are left to work on iReady independently, they do not complete the lessons or complete them with a high enough mastery score. Our teachers/staff support these efforts during study hall. Additionally, they work to complete missing or un-mastered assignments with students who finish their iReady pathway lessons each week.

#### **D. Monseñor Oscar Romero Charter School Interim Executive Administrator's Report**

At MORCS, we understand that many of our students are academically behind. Our state data confirms this, and it is evident that many of our students are not entirely performing at grade level yet. With distance learning taking place for so long, many of our students came to us with gaps in both ELA and Mathematics. In reviewing our state data and verifying data as a team, it became clear that although many of our students are not performing at grade level, they are progressing toward grade-level mastery.

Our iReady Verified Data indicates that more than half of our students made positive growth and met their annual growth goals, which suggests they are progressing toward grade-level mastery (see table below). Support Classes After reviewing data sets, it was clear that we had to put together an action plan for the 22-23 school year to ensure that we were strategically filling academic gaps throughout the school year. This year, we created support classes where students were grouped based on educational needs. Our teachers had time to review CAASPP and iReady data at the start of the school year and create groups that enabled them to provide academic support in small-group settings. Our support classes are under 20 students per group, and teachers strategically use resources from the iReady program to target learning gaps in the classroom. These groups see each other daily for 50 minutes. In December 2022, our team was able to look at the data from their second diagnostic and move students around accordingly so that they were placed in classes that supported their greatest academic needs. Our support classes include Math Support, English Support, History Support, and Science Support. Advisory Additionally, we are using our advisory classes to have social-emotional and academic check-ins with our students, allowing our teachers to conference with them and ask how they feel about their academic growth and progress.

This check-in during advisory is particularly helpful to our EL students and students with special needs as they can connect with their teacher one-on-one. One of the programs that we have been using in advisory this year is Sown to Grow. The program allows us to create check-in questions focused on social-emotional and academic needs. Teachers can see student responses, and our administrative team receives notifications if students



indicate that they are struggling social-emotionally, which we forward to our counselor, who then checks in with students to provide the necessary support. Additionally, we've structured our advisory program to serve as a class that allows students to engage in goal setting, community circles, 1-on-1 check-ins, and journaling. The purpose of advisory this year has been to build community with students; to ensure that every student has a staff advisor that will look out for their overall academic and socioemotional needs; to provide students with wraparound supports, guidance, and skills to be successful in school and later in career and life.

## E. YPICS Executive Director's Report

### Summer School Program

YPICS is scheduled to operate Summer Schools at Bert Corona and Monsenor Oscar Romero Charter Schools. Summer School is currently planned to begin the week after school ends. Expanded Learning The Expanded Learning Opportunities Program (ELO-P) funds after-school and summer enrichment programs for transitional kindergarten (TK) through sixth grade.

**"Expanded learning"** means before-school, after-school, summer, or intersession learning programs that focus on developing pupils' academic, social, emotional, and physical needs and interests through hands-on, engaging learning experiences. Expanded learning programs are pupil-centered; results-driven; include community partners; and complement, but do not replicate, learning activities in the regular school day and school year. Next year, schools will receive an audit finding if the ELO-P is not implemented and if funds are not spent. The budget update can be seen in the fiscal budget reports. The proposed legislation contains dozens of other changes. Most are technical, but more substantive ones of interest to charter schools include the following:

- Clarifies penalties for not offering Expanded Learning under the state's new Expanded Learning Opportunities Program (ELOP).
- It would clarify the interaction of penalties for (1) failing to serve eligible students and (2) failing to operate the program for all the required hours or days. The law would call for pro-rata penalties based on the proportion of eligible students not served. Any additional penalties for failing to operate the program for the required number of hours or days would be assessed after the first type of penalty is set (if any) and would reduce funding by 0.0049 times the number of days a charter school failed to meet the daily/hourly offering requirement.

YPI Charter Schools provide students with various engaging vendors, field trips, assemblies, and special events. We are excited to provide our students with multiple possibilities and exciting opportunities. Oversight Visits The middle schools have each had their respective oversight visits. Monseñor Oscar Romero Charter School participated in this review on April 14, 2023. Thank you, Board President Keipp, for joining the visit! The Team was well prepared, and the focus on rigor and joy could be seen throughout the school that Friday. The Bert Corona Middle visit happened on Tuesday, April 18, 2023.

Our Successful All partners also joined us for both holidays. Both schools were prepared and proud of the teacher instructional work and student engagement. The High School visit is Friday, April 28, 2023. Board Treasurer Michael Green plans to join us for this visit. The YPI Charter Schools' are still supported by CSD Specialist Dr. Blanca Alves-Monster. She has been with us for 7 (almost 8) years. We expect final reports by the end of June or early July. We will provide the Board with the words as soon as we receive them.

### **LCAP Update**

The school leaders have been on listening tours all year during parent meetings, teacher TPDs, student councils, SAC Meetings, and reading survey results from the November Youth Truth Survey, Parent Conference Spring Survey, YPICS Community Data Walks, and Café Con Los Directores meetings. The purpose of the listening tours is to consistently gather stakeholder feedback about what is working at our schools and clearly define growth areas. The YPICS Teams have been collecting data all year. We are currently reviewing current LCAPS goals and are preparing new action steps. LCAPs will be shared with Stakeholders in May and brought before the Board for Approval in June.

## **IV. Items Scheduled For Action**

### **A. YPICS March 2023 Financials and Check Registers**

C. Lopez made a motion to approve the March 2023 financials and check registers as submitted.

M. Green seconded the motion.

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

### **B. YPI Charter Schools Masking Policy**

C. Lopez made a motion to update the YPICS COVID-19 protocols to making masking optional indoors and outdoors.

M. Green seconded the motion.

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

### **C. Teacher Salary Table Increase Effective January 2023**

C. Lopez made a motion to increase the teacher salary table by 1.59% effective January 2023.

M. Green seconded the motion.

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

### **D. BCCHS Prop 39 Offer**

M. Green made a motion to approve the BCCHS FY23-24 Prop 39 offer of \$273,425.46.

D. Cho seconded the motion.

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

### **E.**

### **SAC and ELAC**

M. Green made a motion to combine the SAC and ELAC committees.

D. Cho seconded the motion.

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

### **V. Closed Session**

#### **A. Government Code 54957 PUBLIC EMPLOYEE PERFORMANCE EVALUATION - Evaluation of the Executive Director**

The Board moved into Closed Session at 7:48pm for matters pertaining to Government Code 54957 PUBLIC EMPLOYEE PERFORMANCE EVALUATION - Evaluation of the Executive Director.

No action was taken in the closed session.

### **VI. Open Session**

#### **A. Action Taken in Closed Session**

The Board reconvened in Open Session at 8:07pm.

Board Chair, Mary Keipp reported there was no action taken in closed session.

### **VII. Announcements**

#### **A. Closing Announcements**

The next Finance Committee meeting, Tech meeting and regular Board Meeting will be held on Monday, June 5, 2023.

### **VIII. 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 8:08 PM.

Respectfully Submitted,

Y. Zubia

---

### **Documents used during the meeting**

- YPIBERT 8054 - Oversight Guiding Questions-Verified Data-Special Education (3).pdf
- YPIOSCAR 8196 Oversight Guiding Questions-Verified Data-Special Education (2) (1).pdf
- Executive Director Report April 2023 Final (1).pdf

- 22-23 YPICS Financials Board Packet 03.23.pdf
- Board Brief Recommendation to Approve 2023 Salary Exempt Compliance YPICS Salary Table Alignment.v3.pdf
- Bert Corona Charter High 2023-24 Final Offer 03-31-23-signed.pdf
- Board Brief Recommendation to Approve Combining SAC and ELAC for the. 2022-23 through 2024-25 School Years.pdf

# Coversheet

## Approval of May 8, 2023 Regular Board Meeting Minutes

**Section:** I. Opening Items  
**Item:** F. Approval of May 8, 2023 Regular Board Meeting Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for YPICS Regular Board Meeting on May 8, 2023

APPROVED

# Youth Policy Institute Charter Schools (YPICS)

## Minutes

### YPICS Regular Board Meeting

---

#### **Date and Time**

Monday May 8, 2023 at 6:00 PM

#### **Location**

The Meeting will be held at:

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101  
Granada Hills, CA 91344

Board members will be calling in from the following addresses:

405 Hilgard Avenue, Los Angeles CA 90095,  
1734-1/2 S. Vermont, Los Angeles CA 90006  
6934 Enfield Avenue, Reseda CA 91335  
27201 Tournay Road, Valencia CA 91355

The Public may also access the live stream of the meeting and make presentations to the Board from our campus locations listed below or the at the addresses any board member is calling in from.

Bert Corona Charter School  
9400 Remick Avenue Pacoima, CA 91331

Bert Corona Charter High School  
12513 Gain Street Pacoima, CA 91331

Monseñor Oscar Romero Charter School  
2670 W. 11th Street Los Angeles, CA 90006

---

#### **Trustees Present**

D. Cho (remote), M. Green, M. Keipp (remote), S. Mendoza (remote), W. Njboke

---

### **Trustees Absent**

C. Lopez

### **Guests Present**

F. Zepeda (remote), I. Castillo (remote), K. Myers (remote), R. Bradford, R. Duenas (remote), Y. King-Berg, Y. Zubia (remote)

---

## **I. Opening Items**

### **A. Record Attendance and Guests**

### **B. Call the Meeting to Order**

M. Green called a meeting of the board of trustees of Youth Policy Institute Charter Schools (YPICS) to order on Monday May 8, 2023 at 6:04 PM.

### **C. Additions/Corrections to Agenda**

There were no additions or corrections to the agenda.

## **II. Communications**

### **A. Presentations from the Public**

There were no presentations from the Public.

## **III. Items Scheduled For Action**

### **A. Moving Excess Funds from PAC West Bank to California Credit Union**

M. Keipp made a motion to ratify moving 6.3 million dollars from Pacific Western Bank to California Credit Union and leaving 1.8 million dollars in the Pacific Western Bank account for operational purposes.

W. Njboke seconded the motion.

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

### **B. Operation Funds In PAC West Bank Under Sweep Account**

M. Keipp made a motion to move the 1.8 million dollars in operational funds in the Pacific Western Bank checking account to a sweep account under Pacific Western Bank.

W. Njboke seconded the motion.

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

The Board has directed the Executive Director to research on the effects of moving all monies into the Pacific Western Bank sweeping account.

#### **IV. Announcements**

##### **A. Closing Announcements**

The next regular board meeting will be held at the Learning and Support Center on Monday, June 5, 2023 along with the tech and finance committee meetings.

#### **V. Closing Items**

##### **A. Adjourn Meeting**

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:49 PM.

Respectfully Submitted,  
Y. Zubia



# Coversheet

## Approval of June 5, 2023 Regular Board Meeting Minutes

**Section:** I. Opening Items  
**Item:** G. Approval of June 5, 2023 Regular Board Meeting Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for YPICS Regular Board Meeting on June 5, 2023

APPROVED

# Youth Policy Institute Charter Schools (YPICS)

## Minutes

### YPICS Regular Board Meeting

---

#### **Date and Time**

Monday June 5, 2023 at 6:00 PM

#### **Location**

The Meeting will be held at:

Bert Corona Charter School  
Room 3  
9400 Remick Avenue Pacoima, CA 91331

The Public may also access the live stream of the meeting and make presentations to the Board from our campus locations listed below or the at the addresses any board member is calling in from.

YPI Charter Schools  
Learning and Support Center  
10660 White Oak Avenue, Suite B101  
Granada Hills, CA 91344

Bert Corona Charter High School  
12513 Gain Street Pacoima, CA 91331

Monseñor Oscar Romero Charter School  
2670 W. 11th Street Los Angeles, CA 90006

---

#### **Trustees Present**

C. Lopez, M. Green, M. Keipp, W. Njboke

#### **Trustees Absent**

D. Cho, S. Mendoza

#### **Trustees who arrived after the meeting opened**

W. Njboke

---

## **Guests Present**

Diana Gamez, F. Zepeda (remote), I. Castillo, J. Osorio, R. Bradford, R. Duenas (remote), S. Castrellon (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 Jun 5, 2023 at 6:15 PM.

### **C. Additions/Corrections to Agenda**

## **II. Communications**

### **A. Presentations from the Public**

There were no presentations from the Public.

## **III. Items Scheduled for Information**

### **A. Board Committee Reports**

The Academic Committee met on April 20, 2023, and reviewed Mid-Year iReady and NWEA MAPs results from the current school year. Growth has occurred across the schools, and the achievement gap is closing. The school's verifiable data is robust, and, most importantly, Academic Achievement is increasing. However, we need to continue to track consistently the data points that are being tracked on the CDE dashboard and by YPICS. The schools' area of growth is consistently tracking subgroup growth and ensuring that vendors produce those data points as part of their reporting management structures. The Summer Academic Committee Meeting will focus on a deep data dive and a review of the school success plans after the verifiable data and SBAC scores are received.

The Finance Committee met before the regular board meeting and discussed the health benefits Plan cost, Salary schedules for teachers, and the preliminary budget for the 23-24 school year.

### **B. School Committee/ Council Reports**

### **C. Bert Corona Executive Administrator's Report**

This year's academic focus was EL growth. Two years ago, the reclassification rate was 0, the following 11% and this year it has grown to 18%; that is higher than the district and the state.

### **iReady, CAASPP and ELPAC**

We are currently wrapping up our CAASPP testing for the school year and we have already finished our ELPAC testing. 20 students have completed and passed the ELPAC, met the standardized testing requirements, and have the grades they need to reclassify this school year. This equates to 18%, which is an increase from last school year and is higher than the state reclassification rates. The most recent state reclassification rates provided to us during our LAUSD oversight visit were 13.8% in 2019-2020 and 6.9% in 2020-2021. We have a couple more kids who we are working with to improve their grades in the ELA classes and we are giving students one more opportunity to take their HMI test, so our percentage may increase slightly in the next week.

For CAASPP testing, we focused on student participation and focus so we could provide an incentive for the test. Students received up to 3 points per day for being on time for testing, focusing the entire time (trying their best), and for maintaining a safe and respectful learning environment. If students earned at least 10/12 points by the end of the week, they earned Smash Burgers and Free games during our Pop Day event on June 5th. The kids are very excited and keep asking about getting their bracelets and tickets so they can get their rewards on Pop Day! We are planning to do a celebration for returning students who grow and hit grade level after we receive their scores in the fall/late summer.

This year on iReady in reading, we hit our targets schoolwide. We hit 128% of our expected growth, and 58% of our students hit their expected growth (iReady reports that more than 50% of students hitting their growth indicates success as a school).

In math, we did not perform quite as well: we achieve 92% of our typical growth and only 48% of our students hit their growth targets.

W. Njboke arrived.

### **D. Monseñor Oscar Romero Charter School Interim Executive Administrator's Report**

MORCS is ending the school year on a positive note. Test scores have revealed 54-56% of students have met or exceeded their growth goals, and the film students participated in a film festival in collaboration with the Youth Cinema Project, where their film was showcased.

### **Reading Schoolwide and Grade-Level Typical Growth**

Our school saw 56% of our students meet their annual typical growth goal. This indicator is promising as it indicates that 56% of our students made positive progress toward grade-level mastery. With a continued focus on academic support and instruction tailored to meet the needs of our students, we are confident that these students will continue to make necessary gains to get them closer to grade level performance in Reading next school year. See the table below for a detailed breakdown of the progress toward annual typical growth goals determined by the iReady reading diagnostic. Additionally, you'll find a table that breaks down the performance data by grade level. Our 6th and 8th-grade students met their target goal of 51% meeting or exceeding their annual typical growth goal, but our 7th-graders fell short of meeting their goal, with only 42% meeting their specific yearly growth goal. This indicates that we will need to refocus our approach and target our 7th-grade students strategically to ensure they receive the necessary instruction to help increase their gains next.

School year.

### **Math Schoolwide and Grade-Level Typical Growth**

54% of our students could meet their annual typical growth goal. This indicates that more than half of our students made positive gains and are en route to reaching grade-level mastery if they can demonstrate similar growth in the coming year or two. In looking at the grade level achievements, our 8th-grade group saw the highest increase, with 64% of our 8th-grade students meeting their annual typical growth goal. 7th grade was 1% shy of their target, with 50% of 7th-grade students meeting their annual specific growth goal. 6th grade was just 2% scared of meeting their mark, with 49% of our 6th graders meeting their specific growth goal. This data gives us hope that we will be able to continue to work with our 6th and 7th graders to achieve even higher numbers in the coming year or two, as we will be able to target students and place them in support classes strategically to ensure that they're receiving the necessary supports to meet their growth goals. For your reference, the attached tables provide specific details for our school and the individual grade levels.

## **E. Bert Corona Charter High School/ COO's Report**

The high school is seeing an upward enrollment trend that looks promising. Schola, the high school's outreach vendor, filmed a video for recruitment efforts. The high school also had an open house to showcase the school and the different programs offered.

### **Interim Executive Administrator- Bert Corona Charter High School Instruction I**

Internal and State Testing May is a testing month. Staff will review this year's schedule to develop a less intrusive testing schedule for students and staff. The sheer number of "major" tests may impact students' performance on their exams.

Students took the following tests:

- NWEA Maps- All grades
- CAASPP- 11th grade
- CAST- 12th grade
- ELPAC- English Language Learners in all grades
- Houghton Mifflin Reading Inventory- English Language Learners in all grades
- AP Biology- Various students
- AP Spanish- Various students
- AP Environmental Science- Various students
- AP English Language and Composition-

**Various students College Ready College Visits** 9th graders (50 Students) visited UC Riverside on Friday, June 2, 2023. Students toured the campus and had lunch in the dining commons. Students were excited about the size of the campus and the number of students they saw. Students asked different questions that heavily focused on the social aspects of college, including intramural sports and food quality. One student asked about stress management. Another student did ask questions about the tour guide's major and why she chose that major. Each grade level was able to go on a college visit this year:

9th grade- UC Riverside

10th grade- UC Santa Barbara

11th/12th grade- UC Berkeley, UC Santa Cruz, Cal State University Monterey Bay, San Francisco State University

**College Admissions** The Class of 2023 have accepted admission to the following schools: Los Angeles Mission College- 3 Los Angeles Trade- technical College- 1 Santa Monica College- 1 Cal Poly Humboldt- 2 San Jose State University- 1 Cal State University Northridge- 9 Cal State University Fullerton- 3 Cal State University Los Angeles- 2 Cal State University Channel Island- 2 Cal State University Stanislaus- 1 Cal State University Chico- 1 University of La Verne- 1 Woodbury University- 2 Vanguard University- 1 UC Davis- 1 UC Santa Cruz- 1 UC Riverside- 2 UC Merced- 1

**Operations Facilities** Space is a challenge at BCCHS. LAUSD Maintenance and Operations installed the new electrical outlet in the main office so the copy machine could be moved to the front of the main office. Moving the copier allows for the back office to be used as a conference room, allowing for more flexibility. The installation was requested and paid for in December. Outreach and Recruitment Enrollment for the 23-24 school year is currently expected to be higher than the 22-23 school year by 7 students.

F.

## **YPICS Executive Director's Report**

### **G. Preliminary 23-24 Budget Presentation**

Irina presented the preliminary budget with projected revenue and expense assumptions. The final budget will be brought back to the Board on June 26, 2023.

### **H. Technology Replacement Plan Year 2 Update**

### **I. LCAP Update: Changes to 23-24**

## **IV. Consent Agenda Items**

### **A. Background**

### **B. Consent Items**

M. Green made a motion to approve the consent agenda items.

C. Lopez seconded the motion.

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

## **V. Items Scheduled For Action**

### **A. YPICS April 2023 Financials and Check Registers**

M. Green made a motion to approve the YPICS April 2023 financials and check registers as submitted.

C. Lopez seconded the motion.

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

### **B. Proposed FY23-24 Teacher Salary Table Increases and Retention Bonuses**

C. Lopez made a motion to approve the proposed 5% increase to the teacher salary table with a 5% bonus.

W. Njboke seconded the motion.

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

### **C. Contracts Above the Executive Director's Spending Authority**

C. Lopez made a motion to approve the MORCS Think Together Contract, the MORCS Youth Cinema Contract, the Relay Leadership and Teacher contracts and the Stile contract with the updated amount of \$80,094.

W. Njboke seconded the motion.

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

### **D. Hiring of a Chief Accountability Officer**

M. Green made a motion to approve the hiring of a Chief Accountability Officer.

W. Njboke seconded the motion.

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

#### **E. SFA Meal Vendor Selection**

C. Lopez made a motion to approve awarding the food services management contract to Fresh Start.

W. Njboke seconded the motion.

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

### **VI. Announcements**

#### **A. Closing Announcements**

5th grader promotion will be on Friday, June 9th at 9:00 AM.

8th grade BCCS culmination will be on Friday, June 9th at 6:00 PM

8th grade MORCS culmination will be on Friday, June 9th at 4:30 PM

12th grade BCCHS graduation will be on Thursday, June 8th at 6:00 PM.

The next regular board meeting will be June 26, 2023.

### **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 7:55 PM.

Respectfully Submitted,

Y. Zubia



# Coversheet

## Bert Corona Executive Administrator's Report

**Section:** III. Items Scheduled for Information  
**Item:** C. Bert Corona Executive Administrator's Report  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** 22-23 BCCS EA Board Report (June #2).docx.pdf



## **BCCS Executive Administrator Report**

**June 22, 2023**

*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.*

**(Since there were 2 board meetings in June and one was just before our culmination, not much has happened at the school. We did have CFG training org-wide and we started summer programming this week. However, this report will focus only on attendance and iReady data).**

### **Enrollment, Attendance:**

Currently, our enrollment for next school year is at 342. We have 17 more 7th grade students on the waiting list we can reach out to and a few more 8th grade students. We are hoping to be at about 350-360 for next school year based on these numbers.

**Enrollment specifics are below:**

<b>5th grade</b>	<b>9</b>
<b>6th grade</b>	<b>119</b>
<b>7th grade</b>	<b>107</b>
<b>8th grade</b>	<b>107</b>
<b>Total</b>	<b>342</b>

### **iReady, CAASPP and ELPAC**

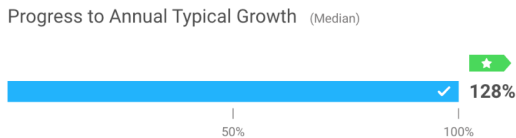
We just completed our CAASPP testing for the school year and we have already finished our ELPAC testing. 20 students have completed passed the ELPAC, met the standardized testing requirements, and have the grades they need to reclassify this school year. This equates to 18%, which is an increase from last school year and is higher than the state reclassification rates. The most recent state reclassification rates provided to us during our LAUSD oversight visit were 13.8% in 2019-2020 and 6.9% in 2020-2021.

For CAASPP testing, we focused on student participation and focus so we could provide an incentive for the test. Students received up to 3 points per day for being on time for testing, focusing the entire time (trying their best), and for maintaining a safe and respectful learning environment. If students earned at least 10/12 points by the end of the week, they earned Smash Burgers and Free games during our Pop Day event on June 5th. The kids are very excited and keep asking about getting their bracelets and tickets so they can get their rewards on Pop Day! We are planning to do a celebration for returning students who grow and hit grade level after we receive their scores in the fall/late summer.

This year on iReady in reading, we hit our targets schoolwide. We hit 128% of our expected growth, and 58% of our students hit their expected growth (iReady reports that more than 50% of students hitting their growth indicates success as a school).

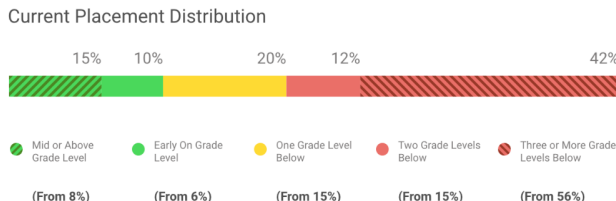
Subject: Reading | School: Bert Corona Charter Middl...  
 Academic Year: Current Year | Comparison Diagnostic: Most Recent

Students Assessed/Total: 328/331



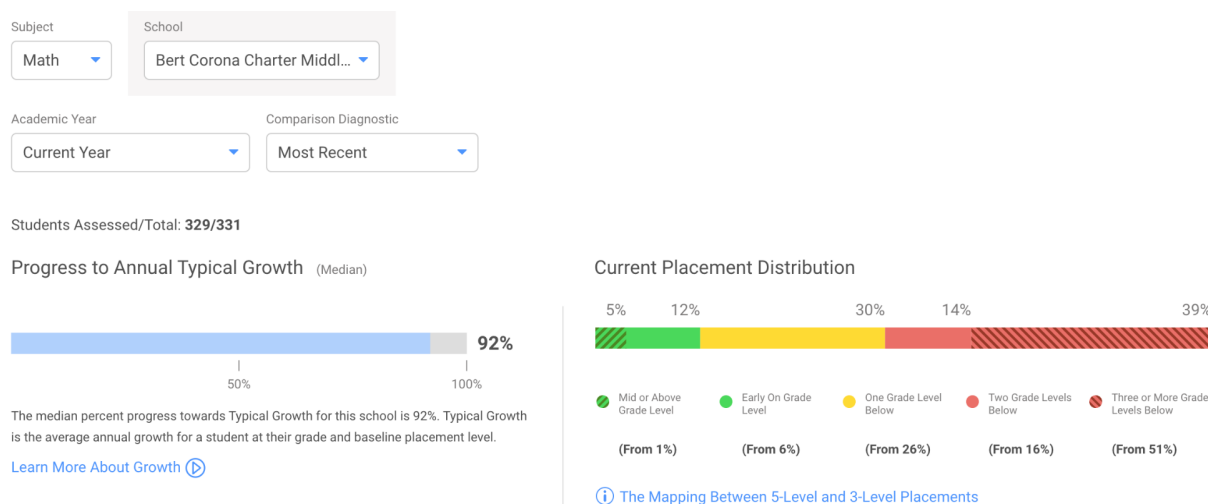
The median percent progress towards Typical Growth for this school is 128%. Typical Growth is the average annual growth for a student at their grade and baseline placement level.

[Learn More About Growth](#)



[The Mapping Between 5-Level and 3-Level Placements](#)

In math we did not perform quite as well: we achieve 92% of our typical growth and only 48% of our students hit their growth targets.



In conducting a deeper analysis, our 7th grade scores are the ones that brought down our averages school wide. We have 2 7th grade teachers we have asked to not return next year, and we have two returning teachers with whom we will work to implement all of our key features and foundational strategies (group learning, projects, and cyclical instruction) to ensure these teachers achieve higher results next year. Other than these teachers, all others hit their growth targets in math and in ELA.

When digging into the the data for our subgroups, we found the following. We had very strong growth for our English Learners in math and in reading, hitting 135% of typical growth in reading and 93% in math. Additionally 100% typical growth was met for our SED population and our students with special needs. While we had strong growth in all subgroup areas in terms of improved placement, some of the strongest numbers were in math, with 60% of ELs improving their placement and 64% of students with special needs improving theirs. One area of focus for next year could be our SED population, particularly in math.

**READING:**

	<b>English Learners</b>	<b>SED</b>	<b>SWD</b>
Annual Typical Growth	135%	100%	100%
Annual Stretch Growth	47%	32%	37%
% with Improved Placement	58%	49%	50%

**MATH:**

	<b>English Learners</b>	<b>SED</b>	<b>SWD</b>
Annual Typical Growth	93%	77%	112%
Annual Stretch Growth	40%	33%	49%
% with Improved Placement	60%	47%	64%

# Coversheet

## Monseñor Oscar Romero Charter School Interim Executive Administrator's Report

**Section:** III. Items Scheduled for Information  
**Item:** D. Monseñor Oscar Romero Charter School Interim Executive  
Administrator's Report  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** MORCS EA Board Report 06\_26\_2023 (1).pdf



As our school year comes to a close, we are now able to see the outcome of the hard work that our students and teachers have put in throughout the school year. In this board report you'll find the following updates:

- iReady Diagnostic Growth Report - Subgroup Breakdown

### **Economically Disadvantaged**

24% of our Economically Disadvantaged Students scored at grade level in Reading while 17% scored at grade level in Math. 55% of students in this subcategory met their typical growth goal in Reading and Math, with the median typical growth in Reading being 125% and 117% in Math. Overall, this subgroup exceeded our goal of 51% meeting their typical growth goal. See the reports below for further information regarding the performance of our Economically Disadvantaged Students.

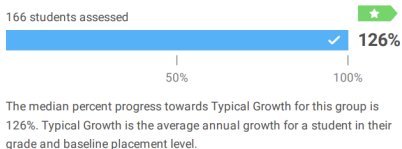


## Diagnostic Growth

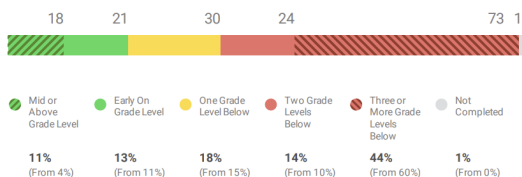


School: Monsenor Oscar Romero Charter School  
 Subject: Reading  
 Teacher: All Teachers  
 Class/Report Group: Economically Disadvantaged Reading  
 Comparison Diagnostic: Most Recent

### Progress to Annual Typical Growth (Median)

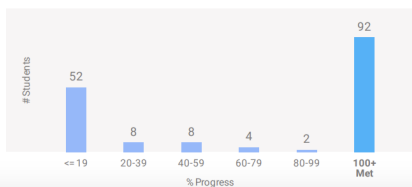


### Current Placement Distribution

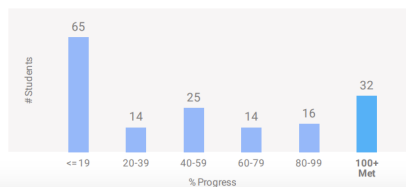


### Progress Distributions

Distribution of Progress to Annual Typical Growth

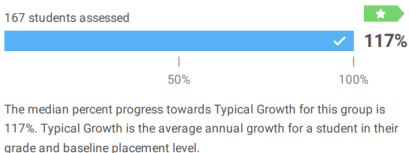


Distribution of Progress to Annual Stretch Growth®

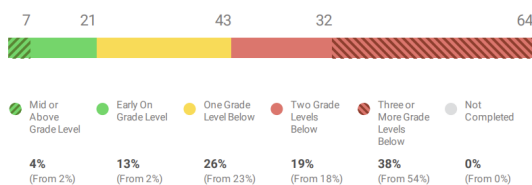


School: Monsenor Oscar Romero Charter School  
 Subject: Math  
 Teacher: All Teachers  
 Class/Report Group: Economically Disadvantaged Math  
 Comparison Diagnostic: Most Recent

### Progress to Annual Typical Growth (Median)

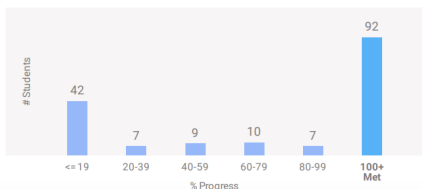


### Current Placement Distribution

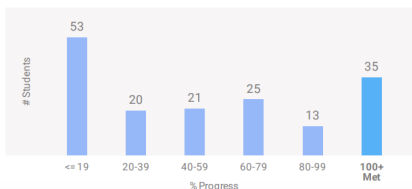


### Progress Distributions

Distribution of Progress to Annual Typical Growth



Distribution of Progress to Annual Stretch Growth®



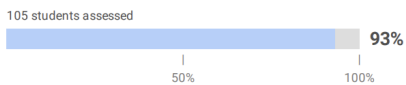
### **English Learners**

11% of our English Learner Students scored at grade level in Reading while 5% scored at grade level in Math. 60% of students in this subcategory met their typical growth goal in Reading while 49% met it in Math, with the median typical growth in Reading being 141% and 97% in Math.

Overall, this subgroup exceeded our goal of 51% meeting their typical growth goal in Reading and fell just 2% shy in Math. See the reports below for further information regarding the performance of our English Learner Students.

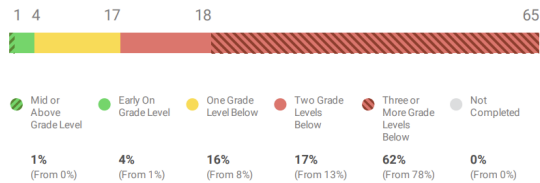
School: Monsenor Oscar Romero Charter School  
 Subject: Math  
 Teacher: All Teachers  
 Class/Report Group: ELs Schoolwide Math  
 Comparison Diagnostic: Most Recent

Progress to Annual Typical Growth (Median)



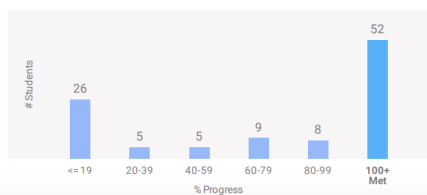
The median percent progress towards Typical Growth for this group is 93%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

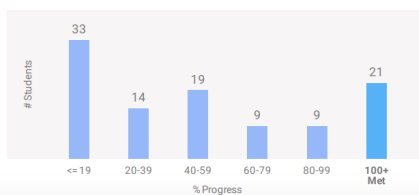


Progress Distributions

Distribution of Progress to Annual Typical Growth

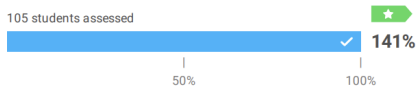


Distribution of Progress to Annual Stretch Growth®



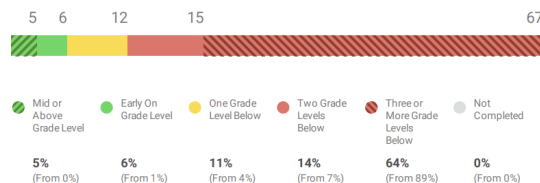
School: Monsenor Oscar Romero Charter School  
 Subject: Reading  
 Teacher: All Teachers  
 Class/Report Group: ELs Schoolwide Reading  
 Comparison Diagnostic: Most Recent

Progress to Annual Typical Growth (Median)



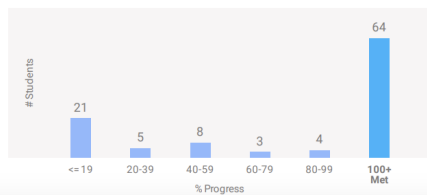
The median percent progress towards Typical Growth for this group is 141%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

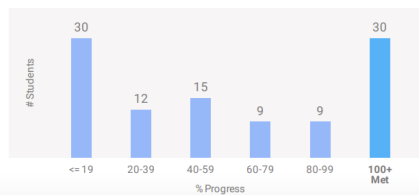


Progress Distributions

Distribution of Progress to Annual Typical Growth



Distribution of Progress to Annual Stretch Growth®



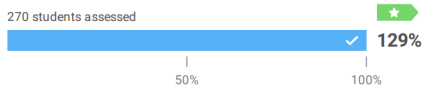
### **Latino Students**

24% of our Latino Students scored at grade level in Reading while 16% scored at grade level in Math. 55% of students in this subcategory met their typical growth goal in Reading while 53% met it in Math, with the median typical growth in Reading being 129% and 108% in Math.

Overall, this subgroup exceeded our goal of 51% meeting their typical growth goal in Reading and Math. See the reports below for further information regarding the performance of our Latino Students.

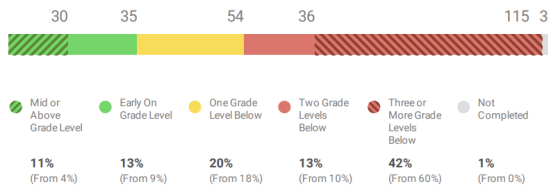
School: Monsenor Oscar Romero Charter School  
 Subject: Reading  
 Teacher: All Teachers  
 Class/Report Group: Latino Reading  
 Comparison Diagnostic: Most Recent

Progress to Annual Typical Growth (Median)



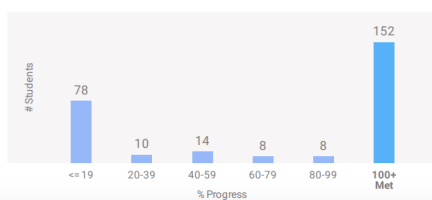
The median percent progress towards Typical Growth for this group is 129%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

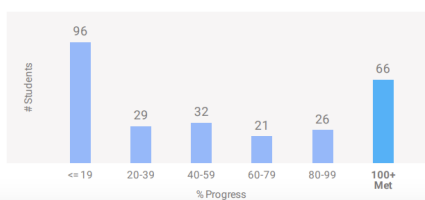


Progress Distributions

Distribution of Progress to Annual Typical Growth

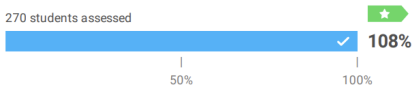


Distribution of Progress to Annual Stretch Growth®



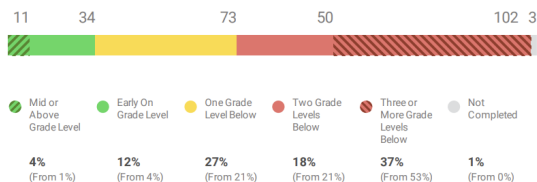
School: Monsenor Oscar Romero Charter School  
 Subject: Math  
 Teacher: All Teachers  
 Class/Report Group: Latino Math  
 Comparison Diagnostic: Most Recent

Progress to Annual Typical Growth (Median)



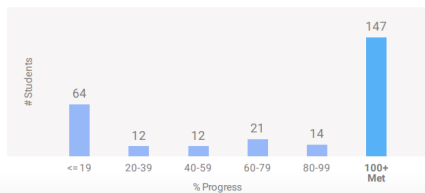
The median percent progress towards Typical Growth for this group is 108%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

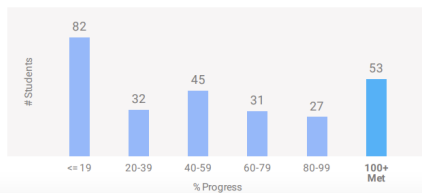


Progress Distributions

Distribution of Progress to Annual Typical Growth



Distribution of Progress to Annual Stretch Growth®

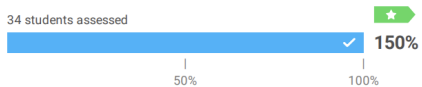


### **Special Education**

21% of our Special Education Students scored at grade level in Reading while 15% scored at grade level in Math. 38% of students in this subcategory met their typical growth goal in Reading while 61% met it in Math, with the median typical growth in Reading being 53% and 150% in Math. Overall, this subgroup exceeded our goal of 51% meeting their typical growth goal in Math and but did not meet it in Reading. See the reports below for further information regarding the performance of our Special Education Students.

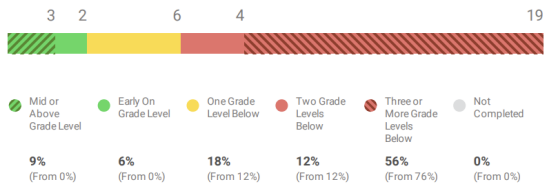
**School** Monsenor Oscar Romero Charter School  
**Subject** Math  
**Teacher** All Teachers  
**Class/Report Group** Resource Math (all)  
**Comparison Diagnostic** Most Recent

Progress to Annual Typical Growth (Median)



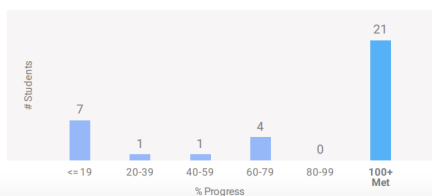
The median percent progress towards Typical Growth for this group is 150%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

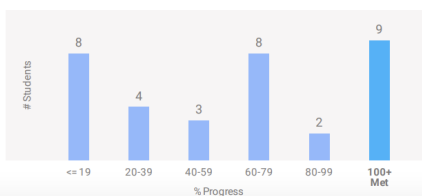


Progress Distributions

Distribution of Progress to Annual Typical Growth

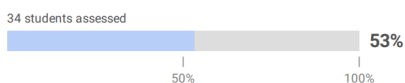


Distribution of Progress to Annual Stretch Growth®



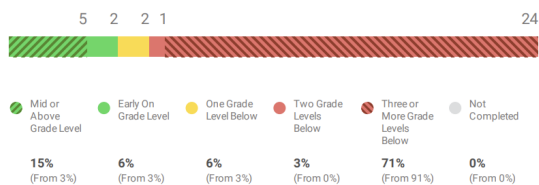
**School** Monsenor Oscar Romero Charter School  
**Subject** Reading  
**Teacher** All Teachers  
**Class/Report Group** Resource Reading (all)  
**Comparison Diagnostic** Most Recent

Progress to Annual Typical Growth (Median)



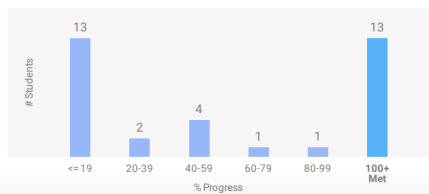
The median percent progress towards Typical Growth for this group is 53%. Typical Growth is the average annual growth for a student in their grade and baseline placement level.

Current Placement Distribution

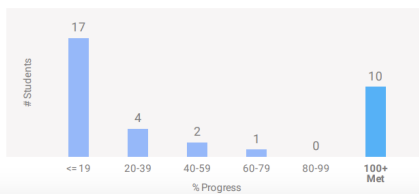


Progress Distributions

Distribution of Progress to Annual Typical Growth



Distribution of Progress to Annual Stretch Growth®

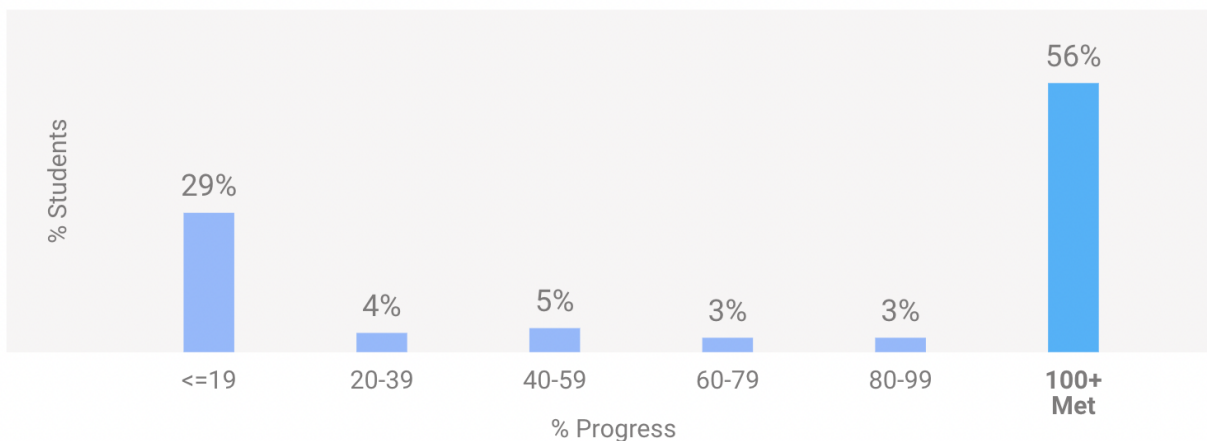


### Reading Schoolwide and Grade Level Typical Growth

Overall, our school saw 56% of our students meet their annual typical growth goal. This indicator is promising as it indicates that 56% of our students made positive progress towards grade level mastery. With continued focus on academic supports and instruction tailored to meet the needs of our students, we are confident that these students will continue to make necessary gains to get them closer to grade level performance in Reading next school year. See the table below for a detailed breakdown of the progress towards annual typical growth goals as determined by iReady reading diagnostic.

Additionally, you'll find a table that breaks down the performance data by grade level. Our 6th and 8th grade students were able to meet their target goal of 51% meeting or exceeding their annual typical growth goal, but our 7th graders fell short of meeting their goal with only 42% of our students meeting their annual typical growth goal. This indicates that we will need to refocus our approach and target our 7th grade students strategically to ensure that they receive the necessary instruction to help increase their gains next school year.

Distribution of Progress to Annual  
Typical Growth





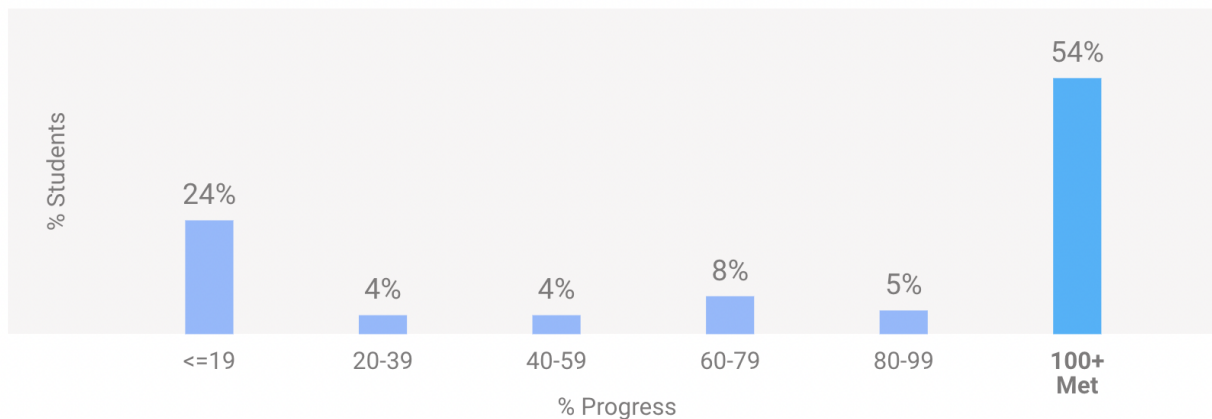
Grade	Annual Typical Growth ⓘ		Annual Stretch Growth® ⓘ		% Students with Improved Placement	Students Assessed/Total
	Progress (Median) ⌵	% Met ⌵	Progress (Median) ⌵	% Met ⌵		
Grade 6	142%	59%	53%	31%	56%	93/95
Grade 7	41%	42%	14%	13%	39%	95/100
Grade 8	209%	69%	60%	29%	64%	86/86

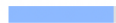
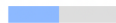




### **Math Schoolwide and Grade Level Typical Growth**

Overall, 54% of our students were able to meet their annual typical growth goal. This indicates that more than half of our students made positive gains and are in route to reach grade level mastery if they're able to demonstrate similar growth in the coming year or two. In looking at the grade level achievements, our 8th grade group saw the highest growth with 64% of our 8th grade students meeting their annual typical growth goal. 7th grade was 1% shy of their target, with 50% of 7th grade students meeting their annual typical growth goal. 6th grade was just 2% shy of meeting their target, with 49% of our 6th graders meeting their typical growth goal.

This data gives us hope that we will be able to continue to work with our 6th and 7th graders to achieve even higher numbers in the coming year or two as we will be able to target students and place them in support classes strategically to ensure that they're receiving the necessary supports to meet their growth goals. For your reference, the attached tables provide specific details for our school and the individual grade levels.

Distribution of Progress to Annual  
Typical Growth



Grade	Annual Typical Growth ⓘ		Annual Stretch Growth® ⓘ		% Students with Improved Placement	Students Assessed/Total
	Progress (Median) ⚡	% Met ⚡	Progress (Median) ⚡	% Met ⚡		
Grade 6	 93%	49%	 45%	15%	60%	92/95
Grade 7	 96%	50%	 42%	14%	56%	98/100
Grade 8	 146%	64%	 57%	31%	64%	84/86

# Coversheet

## YPICS Executive Director's Report

**Section:** III. Items Scheduled for Information  
**Item:** F. YPICS Executive Director's Report  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** ED Report June 2023 .pdf



## ***EXECUTIVE DIRECTOR'S REPORT***

**June 26, 2023**

*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.*

### **State:**

Recession or No Recession; Flip a Coin  
From School Services of California  
Posted June 9, 2023

For its third Anderson Forecast (Forecast) in a row, the UCLA Anderson School of Management has the outlook of the U.S. economy on the flip of a coin—with both a mild recession and a slowly growing economy having nearly equal likelihood of occurring in the third quarter of this year.

One of the biggest determining factors is likely consumer confidence and spending. UCLA's economists noted that Americans still have somewhere between \$800 billion and \$1.2 trillion in excess savings from the pandemic. Under UCLA's recession scenario, the deficit in gross domestic product (GDP) would be \$384 billion less than a steady growth scenario—meaning Americans' consumption of goods and services could make the difference between a mild recession and a continued growing economy. Americans' spending patterns would also affect business investment, and whether companies believe they need to continue to grow to keep up with demand or hit the brakes. Another major sector of GDP, government spending, is likely to remain flat and therefore not be a significant factor in the recession equation.

If a recession does take place, it would likely be experienced by Americans the same way the first half of 2022 felt, with negative GDP annual growth rates but declining inflation and unemployment rates. In the U.S. recession scenario, GDP would be negative for three quarters, returning to positive growth in mid-2024; unemployment would peak at 4.5% in the second quarter of 2024; and inflation would stay higher initially, but ease down more quickly in 2024 and 2025.

Turning to California, UCLA's economists once again focused on the solid footing that the state finds itself in if a recession is on the horizon. Forecast Director Jerry Nickelsburg noted that the current-day State Budget negotiations taking place between the Legislature and Newsom Administration revolve around whether it is sufficiently a "rainy day" situation to warrant tapping into the state's reserves or whether those funds should be retained for more severe economic conditions.

California has regained and surpassed its pre-pandemic number of nonfarm payroll jobs by 2.1% in April 2023, but Nickelsburg stated that job recovery has been uneven by sector and by region of the state, with job growth higher than the nation in every region except the Inland Empire and the State of Jefferson area. Regarding technology layoffs, he notes that those jobs leaving large tech firms are being quickly absorbed by small tech firms and start-ups, fueled by venture capital and high-tech production growth.

Regarding housing, the median price has dropped 8.4% from its peak in California, although this drop only brings the rate back to mid-2021 levels. Nickelsburg stated that Californians moving out of the state during the pandemic did a great job of exporting housing unaffordability with them, driving prices up elsewhere and removing the price advantage that Californians migrating out of state experienced previously.

In summation, if the nation goes into a recession, California will experience basically flat job growth in 2024, and a slightly higher unemployment rate in 2023 and the following two years than in the absence of a recession. UCLA's economists expect the outlook to be clearer by its next Forecast in early October 2023, and hope to drop the dueling scenario projections. Until then, we'll wait to see if Americans spend their savings like the fate of the national economy depends up on it.

## **INSTRUCTION – Expanded Learning**

The Expanded Learning Opportunities Program (ELO-P) provides funding for after-school and summer school enrichment programs for transitional kindergarten (TK) through sixth grade. "Expanded learning" means before-school, after-school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. Expanded learning programs are pupil-centered; results-driven; include community partners; and complement, but do not replicate, learning activities in the regular school day and school year.

The ELOP Budget update will be provided as part of the YPICS Fiscal update. Next year, schools will receive an audit finding if the ELO-P is not implemented and if funds are not spent. The proposed legislation contains dozens of other changes. Most are technical in nature, but some more substantive ones of interest to charter schools include the following:

- Clarifies penalties for not offering Expanded Learning under the state's new Expanded Learning Opportunities Program (ELOP).
- It would clarify the interaction of penalties for (1) failing to serve eligible students and (2) penalties for failing to operate the program for all the required hours or days.

The law would call for pro-rata penalties based on the proportion of eligible students not served. Any additional penalties for failing to operate the program for the required number of hours or days would be assessed after the first type of penalty is assessed (if any) and would reduce funding by 0.0049 times the number of days a charter school failed to meet the daily/hourly offering requirement.

CAASPP and i-Ready Status Growth Comparison (FY22 and FY23) The following is a comparison of the growth and academic status gains made by the YPI Charter Public Schools. As of June 19, 2023, we have about 20% of the scores received. Therefore, we will report CAASPP scores and NWEA Maps high school data results at the next regularly scheduled Board Meeting. All schools have met the Typical Growth Target rate of 50% and are showing gains in ELA and Mathematics.

YPICS Middle Schools Data Update:

ELA	Growth				Status							
	i-Ready % Typical Growth Met				i-Ready % Stretch Met				i-Ready % Met Grade level			
School Year	19-20	20-21	21-22	22-23	19-20	20-21	21-22	22-23	19-20	20-21	21-22	22-23
BCCS	49	53	67	58	20	28	32	25	23	25	24	25
MORCS	51	56	57	56	25	28	24	25	24	25	23	24
State												

ELA	Placement Distribution		Placement Distribution	
	i-Ready % Increase Grade Level		i-Ready % Decrease 3+ Below Grade Level	
	BOY	EOY	BOY 22	EOY
BCCS				
19-20	12	23	56	44
20-21	14	27	56	44
21-22	13	24	57	40
22-23	14	25	56	42
MORCS				
19-20	12	24	57	43
20-21	17	25	56	47
21-22	14	23	60	41
22-23	13	24	60	42

*i-Ready ELA Growth Score Reports Spring 2020, 2021, 2022, & 2023*

	Growth				Status							
<b>Math</b>	i-Ready % Typical Growth Met				i-Ready % Stretch Met				i-Ready % Met Grade level			
School Year	19-20	20-21	21-22	22-23	19-20	20-21	21-22	22-23	19-20	20-21	21-22	22-23
BCCS	50	47	59	48	21	20	24	20	22	21	18	17
MORCS	54	51	60	54	24	26	21	19	19	25	17	16
State												

	Placement Distribution		Placement Distribution	
<b>Math</b>	i-Ready % Increase Grade Level		i-Ready % Decrease 3+ Below Grade Level	
	<b>BOY</b>	<b>EOY</b>	<b>BOY 22</b>	<b>EOY</b>
<b>BCCS</b>				
19-20	10	22	45	35
20-21	10	21	44	35
21-22	5	18	48	29
22-23	7	17	51	39
<b>MORCS</b>				
19-20	6	19	52	39
20-21	11	25	49	39
21-22	6	17	53	38
22-23	5	16	54	38

*i-Ready Math Growth Score Reports Spring 2020, 2021, 2022, & 2023*



# Coversheet

## Consent Items

**Section:** IV. Consent Agenda Items

**Item:** B. Consent Items

**Purpose:** Vote

**Submitted by:**

**Related Material:**

1a. Board Brief Recommendation to approve 2023-2024 Homeless Education Policies for BCCS, B CCHS, and MORCS .pdf

1b. bccs Homeless Education Policy June 26 2023 Final.pdf

1c. MORCS Homeless Education Policy 06 26 2023.pdf

1d. BCCHS Homeless Education Policy June 2023.pdf

2a. Recommendation to Renew Accounting Services with ExED Supplement Terms for CAL PADS Support Services for the 2023-2024 fiscal year accounting services with ExED, Inc..pdf

2b. Letter from Anita Landecker Regarding ExED's 2023-24 Fee Increase (1).pdf

2c. YPI CS - ExED Notice of Terms Supplement 2023-24 (1).pdf

3a. Recommendation to approve Continued Membership in CharterSafe for All Mandated liability C overages June 2023 (2).pdf

3b. MemberContrib.YPI Charter Schools Inc..10097 (1).pdf

4a. Recommendation to approve E-Rate Consulting Renewal Proposal for Fiscal Year 2023-2024 fr om Learningtech.org.pdf

4b. ypi\_2023\_2024\_ff\_renewal\_20230528.pdf

4c. scope\_of\_work\_erate\_20230528.pdf

5a. Recommendation to approve continued membership in California Charter Schools Association . pdf

5b. CCSA CMO Invoice - Youth Policy Institute Charter Schools (6).pdf

6a. Recommendation to approve revised YPICS Employee Handbook .pdf

6b. YPICS Employee Handbook 23-24 (redline) (4870-8290-0073.v4) copy.pdf

7a. Recommendation to approve Board of Trustees for 2023-2024 .pdf

8a. Recommendation to approve continued membership in the Charter Schools Development Cent er).pdf

8b. Invoice 23427 (1).pdf

9. YPICS Fiscal Policies and Procedures (approved 10-31-2022) copy.pdf

10a. YKB Update MORCS ENGLISH LEARNER PLAN YKB 2022-20123 (2).pdf

11a. Draft Fixed Term Employment Agreement (Exempt) (4888-4154-8649.v2).pdf

11b. Draft Fixed Term Employment Agreement (Nonexempt) (4866-5094-2057.v2).pdf



## YPI CHARTER SCHOOLS

June 29, 2022

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve 2022-2023 Homeless Education Policies for BCCS, BCCHS, and MORCS**

### BACKGROUND

The Elementary and Secondary Education Act (ESEA) of 1965 was reauthorized as the *Every Student Succeeds Act* (ESSA) and signed into law by President Barack Obama on December 10, 2015. The Local Educational Agency (LEA) Plan has been supplemented with an Addendum to the LCAP at the state level, which describes how federal funds are to be expended in support of goals expressed in the LCAP.

### ANALYSIS

Title I, Part A, ESEA sections 722(g)(1)(I), 722(g)(1)(J)(i), 722(g)(1)(C), 722(g)(3)(E), and 722(g)(1)(J)(iii), defines the regulations of the Homeless Education Policy for schools participating in the federal *Every Student Succeeds Act*.

Each year, the policies for each school must be approved by the Board of Directors.

### RECOMMENDATION

It is recommended that the Board of Directors approve the 2022-2023 Homeless Education Policies for BCCS, BCCHS, and MORCS.

**Attachments: 2022-2023 Homeless Education Policies for BCCS, BCCHS, and MORCS.**



## **Bert Corona Charter School**

### **Homeless Education Policy**

Bert Corona Charter School has designated Kevin Myers as the liaison for homeless children and youths. He may be reached at [drmyers@coronacharter.org](mailto:drmyers@coronacharter.org) or (818) 834-5805.

Bert Corona Charter School agrees to implement the following policy ensure that all children and youth who are homeless receive a free appropriate public education and are given opportunity to succeed in school, consistent with the McKinney-Vento Homeless Assistance Act and requirements of submitting the Consolidated Application for accessing federal categorical funding.

Bert Corona Charter School will ensure that children and youth who are homeless are free from discrimination, segregation, and harassment.

Information regarding this policy, including the educational rights of children and youth identified as homeless will be distributed to all students upon enrollment and once during the school year, provided to students who seek to withdraw from Bert Corona Charter School, as well as other places where children, youth, and families who are homeless receive services, including family and youth shelters, motels, campgrounds, welfare departments, health departments, and other social service agencies. This policy is also available at (insert charter school URL)

#### **Definitions**

Children and youth experiencing homelessness means children and youth who are otherwise legally entitled to or eligible for a free public education and who lack a fixed, regular, and adequate nighttime residence, including:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, campgrounds, or trailer parks due to a lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting placement in foster care.
- Children and youth who have a primary nighttime residence that is a private or public place not designed for or ordinarily used as a regular sleeping accommodation for human beings.
- Children and youth who are living in a car, park, public space, abandoned building, substandard housing, bus or train station, or similar setting.
- Migratory children and youth who are living in a situation described above.

A child or youth will be considered to be homeless for as long as he or she is in a living situation described above.

*Unaccompanied youth* means a youth not in the physical custody of a parent or guardian, who meets the definition of homeless as defined above. The more general term youth also includes unaccompanied youth.

*Enroll and enrollment* means attending school and participating fully in all school activities.

*Immediate* means without delay.

Board Approved: June 29, 2022

Revised: June 26, 2023

*Parent* means a person having legal or physical custody of a child or youth.

*Local liaison* is the staff person designated by Bert Corona Charter School as the person responsible for carrying out the duties assigned to the local homeless education liaison by the McKinney-Vento Homeless Assistance Act.

## **Identification**

Children and youth who qualify as homeless in Bert Corona Charter School will be identified. Data will be collected on the number of children and youth experiencing homelessness in Bert Corona Charter School; where they are living; their academic achievement (including state and local assessments); and the reasons for any enrollment delays or interruptions in their education.

## **School Selection**

Each child and youth enrolled at Bert Corona Charter School identified as homeless has the right to remain enrolled. Services that are required to be provided, including transportation to and from the Bert Corona Charter School and services under federal and other programs, will not be considered in determining feasibility.

## **Enrollment**

Enrollment may not be denied or delayed due to the lack of any document normally required for enrollment, including:

- Proof of residency
- Transcripts/school records (Bert Corona Charter School must contact the student's previous school to obtain school records. Initial placement of students whose records are not immediately available can be made based on the student's age and information gathered from the student, parent, and previous schools or teachers.)
- Immunizations or immunization/health/medical/physical records (If necessary, the school must refer students to the local liaison to assist with obtaining immunizations and/or immunization and other medical records.)
- Proof of guardianship
- Birth certificate
- Unpaid school fees
- Lack of clothing that conforms to dress code
- Any factor related to the student's living situation

Unaccompanied youth must be enrolled immediately in school. They may either enroll themselves or be enrolled by a parent, non-parent caretaker, older sibling, or local liaison.

## **Services**

Children and youth experiencing homelessness will be provided services comparable to services offered to other students in Bert Corona Charter School including:

- Transportation
- Title I, Part A services - Children and youth identified as homeless are automatically eligible for Title I, Part A services
- Educational services for which the student meets eligibility criteria, including special education and related services and programs for English language learners
- Vocational and technical education programs

Board Approved: June 29, 2022

Revised: June 26, 2023

- Gifted and talented programs
- Before- and after-school programs
- Free meals - On the day a child or youth identified as homeless enrolls in school, Bert Corona Charter School must submit the student's name to its food service program coordinator for immediate eligibility.

When applying any standing policy regarding tardiness or absences, any tardiness or absence related to a child or youth's living situation will be excused.

### **Disputes**

If a dispute arises over any issue covered in this policy, the child or youth experiencing homelessness will be admitted immediately to Bert Corona Charter School pending final resolution of the dispute. The student will also have the rights of a student who is homeless to all appropriate educational services, transportation, free meals, and Title I, Part A, services while the dispute is pending.

Bert Corona Charter School will provide the parent or unaccompanied youth with a written explanation of its decision and the right to appeal and will refer the parent or youth to the local liaison immediately. The local liaison will ensure that the student is enrolled at Bert Corona Charter School and is receiving other services to which he or she is entitled and will resolve the dispute as expeditiously as possible. The parent or unaccompanied youth will be given every opportunity to participate meaningfully in the resolution of the dispute. The local liaison will keep records of all disputes in order to determine whether particular issues or schools are repeatedly delaying or denying the enrollment of children and youth identified as homeless. The parent, unaccompanied youth, or school district may appeal the Bert Corona Charter School's decision as provided in Bert Corona Charter School's formal dispute resolution process.

### **Training**

The local liaison will conduct training regarding Title X requirements and sensitivity/awareness activities for all staff of Bert Corona Charter School.

### **Coordination**

The local liaison will coordinate with and seek support from the local district and county coordinator for the Education of Homeless Children and Youth, public and private service providers in the community, housing and placement agencies, local liaisons in neighboring districts, and other organizations and agencies. Coordination will include conducting outreach and training through those agencies. Both public and private agencies will be encouraged to support the local liaison and Bert Corona Charter School in implementing this policy.

Board Approved: June 29, 2022

Revised: June 26, 2023



# Monseñor Oscar Romero Charter School

## Homeless Education Policy

Monseñor Oscar Romero Charter School has designated Rene Quon as the liaison for homeless children and youths. He may be reached at [mrzepeda@romerocharter.org](mailto:mrzepeda@romerocharter.org) or (213) 413-9600.

Monseñor Oscar Romero Charter School agrees to implement the following policy to ensure that all children and youth who are homeless receive a free appropriate public education and are given an opportunity to succeed in school, consistent with the McKinney-Vento Homeless Assistance Act and requirements of submitting the Consolidated Application for accessing federal categorical funding.

Monseñor Oscar Romero Charter School will ensure that children and youth who are homeless are free from discrimination, segregation, and harassment.

Information regarding this policy, including the educational rights of children and youth identified as homeless will be distributed to all students upon enrollment and once during the school year, provided to students who seek to withdraw from Monseñor Oscar Romero Charter School, as well as other places where children, youth, and families who are homeless receive services, including family and youth shelters, motels, campgrounds, welfare departments, health departments, and other social service agencies. This policy is also available at (insert charter school URL)

### Definitions

Children and youth experiencing homelessness means children and youth who are otherwise legally entitled to or eligible for a free public education and who lack a fixed, regular, and adequate nighttime residence, including:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, campgrounds, or trailer parks due to a lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting placement in foster care.
- Children and youth who have a primary nighttime residence that is a private or public place not designed for or ordinarily used as a regular sleeping accommodation for human beings.
- Children and youth who are living in a car, park, public space, abandoned building, substandard housing, bus or train station, or similar setting.
- Migratory children and youth who are living in any situation described above.

A child or youth will be considered to be homeless for as long as he or she is in a living situation described above.

*Unaccompanied youth* means a youth not in the physical custody of a parent or guardian, who meets the definition of homeless as defined above. The more general term youth also includes unaccompanied youth.

*Enroll* and *enrollment* means attending school and participating fully in all school activities.

*Immediate* means without delay.

*Parent* means a person having legal or physical custody of a child or youth.

*Local liaison* is the staff person designated by Monseñor Oscar Romero Charter School as the person responsible for carrying out the duties assigned to the local homeless education liaison by the McKinney-Vento Homeless Assistance Act.

### **Identification**

Children and youth who qualify as homeless in Monseñor Oscar Romero Charter School will be identified. Data will be collected on the number of children and youth experiencing homelessness in Monseñor Oscar Romero Charter School; where they are living; their academic achievement (including state and local assessments); and the reasons for any enrollment delays or interruptions in their education.

### **School Selection**

Each child and youth enrolled at Monseñor Oscar Romero Charter School identified as homeless has the right to remain enrolled. Services that are required to be provided, including transportation to and from the Monseñor Oscar Romero Charter School and services under federal and other programs, will not be considered in determining feasibility.

### **Enrollment**

Enrollment may not be denied or delayed due to the lack of any document normally required for enrollment, including:

- Proof of residency
- Transcripts/school records (Monseñor Oscar Romero Charter School must contact the student's previous school to obtain school records. Initial placement of students whose records are not immediately available can be made based on the student's age and information gathered from the student, parent, and previous schools or teachers.)
- Immunizations or immunization/health/medical/physical records (If necessary, the school must refer students to the local liaison to assist with obtaining immunizations and/or immunization and other medical records.)
- Proof of guardianship
- Birth certificate
- Unpaid school fees
- Lack of clothing that conforms to dress code
- Any factor related to the student's living situation



Unaccompanied youth must be enrolled immediately in school. They may either enroll themselves or be enrolled by a parent, non-parent caretaker, older sibling, or local liaison.

### **Services**

Children and youth experiencing homelessness will be provided services comparable to services offered to other students in Monseñor Oscar Romero Charter School including:

- Transportation
- Title I, Part A services - Children and youth identified as homeless are automatically eligible for Title I, Part A services
- Educational services for which the student meets eligibility criteria, including special education and related services and programs for English language learners.
- Vocational and technical education programs
- Gifted and talented programs
- Before- and after-school programs
- Free meals - On the day a child or youth identified as homeless enrolls in school, Monseñor Oscar Romero Charter School must submit the student's name to its food service program coordinator for immediate eligibility.

When applying any standing policy regarding tardiness or absences, any tardiness or absence related to a child or youth's living situation will be excused.

### **Disputes**

If a dispute arises over any issue covered in this policy, the child or youth experiencing homelessness will be admitted immediately to Monseñor Oscar Romero Charter School pending final resolution of the dispute. The student will also have the rights of a student who is homeless to all appropriate educational services, transportation, free meals, and Title I, Part A, services while the dispute is pending.

Monseñor Oscar Romero Charter School will provide the parent or unaccompanied youth with a written explanation of its decision and the right to appeal and will refer the parent or youth to the local liaison immediately. The local liaison will ensure that the student is enrolled at Monseñor Oscar Romero Charter School and is receiving other services to which he or she is entitled and will resolve the dispute as expeditiously as possible. The parent or unaccompanied youth will be given every opportunity to participate meaningfully in the resolution of the dispute. The local liaison will keep records of all disputes in order to determine whether particular issues or schools are repeatedly delaying or denying the enrollment of children and youth identified as homeless. The parent, unaccompanied youth, or school district may appeal the Monseñor Oscar Romero Charter School's decision as provided in Monseñor Oscar Romero Charter School's formal dispute resolution process.

### **Training**

The local liaison will conduct training regarding Title X requirements and sensitivity/awareness activities for all staff of Monseñor Oscar Romero Charter School.

### **Coordination**

Board Approved: June 29, 2022  
Revised: June 26, 2023

3



The local liaison will coordinate with and seek support from the local district and county coordinator for the Education of Homeless Children and Youth, public and private service providers in the community, housing and placement agencies, local liaisons in neighboring districts, and other organizations and agencies. Coordination will include conducting outreach and training through those agencies. Both public and private agencies will be encouraged to support the local liaison and Monseñor Oscar Romero Charter School in implementing this policy.

Board Approved: June 29, 2022  
Revised: June 26, 2023

4



# YPI CHARTER SCHOOLS

## Bert Corona Charter High School

### Homeless Education Policy

Bert Corona Charter High School has designated Ruben Duenas as the liaison for homeless children and youths. He may be reached at [rduenas@coronacharter.org](mailto:rduenas@coronacharter.org) or (818) 472-9138.

Bert Corona Charter High School agrees to implement the following policy to ensure that all children and youth who are homeless receive a free appropriate public education and are given the opportunity to succeed in school, consistent with the McKinney-Vento Homeless Assistance Act and requirements of submitting the Consolidated Application for accessing federal categorical funding.

Bert Corona Charter High School will ensure that children and youth who are homeless are free from discrimination, segregation, and harassment.

Information regarding this policy, including the educational rights of children and youth identified as homeless will be distributed to all students upon enrollment and once during the school year, provided to students who seek to withdraw from Bert Corona Charter High School, as well as other places where children, youth, and families who are homeless receive services, including family and youth shelters, motels, campgrounds, welfare departments, health departments, and other social service agencies. This policy is also available at (insert charter school URL)

#### Definitions

Children and youth experiencing homelessness means children and youth who are otherwise legally entitled to or eligible for a free public education and who lack a fixed, regular, and adequate nighttime residence, including:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, campgrounds, or trailer parks due to a lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting placement in foster care.
- Children and youth who have a primary nighttime residence that is a private or public place not designed for or ordinarily used as a regular sleeping accommodation for human beings.

- Children and youth who are living in a car, park, public space, abandoned building, substandard housing, bus or train station, or similar setting.
- Migratory children and youth who are living in any situation described above.

A child or youth will be considered to be homeless for as long as he or she is in a living situation described above.

*Unaccompanied youth* means a youth not in the physical custody of a parent or guardian, who meets the definition of homeless as defined above. The more general term youth also includes unaccompanied youth.

*Enroll and enrollment* means attending school and participating fully in all school activities.

*Immediate* means without delay.

*Parent* means a person having legal or physical custody of a child or youth.

*Local liaison* is the staff person designated by Bert Corona Charter High School as the person responsible for carrying out the duties assigned to the local homeless education liaison by the McKinney-Vento Homeless Assistance Act.

## **Identification**

Children and youth who qualify as homeless in Bert Corona Charter High School will be identified. Data will be collected on the number of children and youth experiencing homelessness in Bert Corona Charter High School; where they are living; their academic achievement (including state and local assessments); and the reasons for any enrollment delays or interruptions in their education.

## **School Selection**

Each child and youth enrolled at Bert Corona Charter High School identified as homeless has the right to remain enrolled. Services that are required to be provided, including transportation to and from the Bert Corona Charter High School and services under federal and other programs, will not be considered in determining feasibility.

## **Enrollment**

Enrollment may not be denied or delayed due to the lack of any document normally required for enrollment, including:

- Proof of residency
- Transcripts/school records (Bert Corona Charter High School must contact the student's previous school to obtain school records. Initial placement of students whose records are not immediately available can be made based on the student's age and information gathered from the student, parent, and previous schools or teachers.)
- Immunizations or immunization/health/medical/physical records (If necessary, the school must refer students to the local liaison to assist with obtaining immunizations and/or immunization and other medical records.)

Board Approved: June 29, 2022

Revised: June 26, 2023

2

- Proof of guardianship
- Birth certificate
- Unpaid school fees
- Lack of clothing that conforms to dress code
- Any factor related to the student's living situation

Unaccompanied youth must be enrolled immediately in school. They may either enroll themselves or be enrolled by a parent, non-parent caretaker, older sibling, or local liaison.

### **Services**

Children and youth experiencing homelessness will be provided services comparable to services offered to other students in Bert Corona Charter High School including:

- Transportation
- Title I, Part A services - Children and youth identified as homeless are automatically eligible for Title I, Part A services
- Educational services for which the student meets eligibility criteria, including special education and related services and programs for English language learners
- Vocational and technical education programs
- Gifted and talented programs
- Before- and after-school programs
- Free meals - On the day a child or youth identified as homeless enrolls in school, Bert Corona Charter High School must submit the student's name to its food service program coordinator for immediate eligibility.

When applying any standing policy regarding tardiness or absences, any tardiness or absence related to a child or youth's living situation will be excused.

### **Disputes**

If a dispute arises over any issue covered in this policy, the child or youth experiencing homelessness will be admitted immediately to Bert Corona Charter High School pending final resolution of the dispute. The student will also have the rights of a student who is homeless to all appropriate educational services, transportation, free meals, and Title I, Part A, services while the dispute is pending.

Bert Corona Charter High School will provide the parent or unaccompanied youth with a written explanation of its decision and the right to appeal and will refer the parent or youth to the local liaison immediately. The local liaison will ensure that the student is enrolled at Bert Corona Charter High School and is receiving other services to which he or she is entitled and will resolve the dispute as expeditiously as possible. The parent or unaccompanied youth will be given every opportunity to participate meaningfully in the resolution of the dispute. The local liaison will keep records of all disputes in order to determine whether particular issues or schools are repeatedly delaying or denying the enrollment of children and youth identified as homeless. The parent, unaccompanied youth, or school district may appeal the Bert Corona Charter High School's decision as provided in Bert Corona Charter High School's formal dispute resolution process.

Board Approved: June 29, 2022  
Revised: June 26, 2023

3

## **Training**

The local liaison will conduct training regarding Title X requirements and sensitivity/awareness activities for all staff of Bert Corona Charter High School.

## **Coordination**

The local liaison will coordinate with and seek support from the local district and county coordinator for the Education of Homeless Children and Youth, public and private service providers in the community, housing and placement agencies, local liaisons in neighboring districts, and other organizations and agencies. Coordination will include conducting outreach and training through those agencies. Both public and private agencies will be encouraged to support the local liaison and Bert Corona Charter High School in implementing this policy.



## YPI CHARTER SCHOOLS

June 29, 2022

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve Supplement Terms for CAL PADS Support Services for the 2022-2033 fiscal year accounting services with *ExED, Inc.***

### BACKGROUND

*ExED, Inc.* has provided back-office services for the YPI Charter Schools (YPICS) since 2004. Irina Castillo and Naomi Tarat are, consistent, and available at all hours to answer questions and support the financial work of YPICS.

### ANALYSIS

The Board is reminded that the LAUSD Charter Schools Division regularly commends the business office for how we conduct business, including the level of accuracy, timeliness, integrity, honesty, and innovative solutions implemented to ensure sustainability of the organization. This view, to a great extent, is a result of the support, guidance and assistance we receive from *ExED, Inc.* It should be noted that Irina Castillo, *ExED, Inc.* Vice President, has served YPICS for the past 10 years.

YPICS is in a multi-year agreement as it relates to *ExED's* Management and Accounting services, the Notice of Terms Supplement only reflects changes to the CALPADS Reporting services and fees. While *ExED* does not require us to take any actions for the new terms to take effect on July 1, our board fiscal policies require that the Board approve the Notice of Terms Supplement.

YPICS has been working on a two-year contract for services from *ExED, Inc.*, which was approved by the Board in June, 2021. This only for the CALPAD Reporting services and fees.

## RECOMMENDATION

It is recommended that the Board of Directors approve the *ExED, Inc.* Notice of Terms Supplement, which reflects changes to the CALPADS Reporting services and fees, for the 2022-2023 school year.

**Attachment:** *ExED, Inc.* Notice of Terms Supplement: CALPADS Reporting services and fees, for the 2022-2023 school year.



Dear School Leader:

Looking back on the past two+ decades – starting from when ExED was founded in 1999 – we’ve remained focused on our mission: helping our charter school clients operate at the highest level so that every student has access to an excellent public school. We are proud to have built a team whose expertise, integrity, and high standards of professional excellence have enabled us to stay true to our mission and ensure our client’s ongoing success.

However, the environment in which our clients and ExED operates continues to change. While providing our services at a high level has never been easy, it has become even more challenging due to new demands. We are adapting to an increasing number of funding sources which have added tracking and reporting requirements, more time-consuming audits, new reporting elements required in a CALPADS system with multiple defects, and a steady flow of changing or new requirements to navigate. These changes have increased the workload demands on our staff and required us to expand.

As a mission-driven nonprofit, we have historically tried to underprice our services to help reduce the burden on our charter school clients. We have also continued implementing changes to increase efficiency and reduce operating costs (e.g., since the pandemic, we have downsized our offices). However, given the additional workload demands and higher salary costs, we need to raise our rates next year more rapidly than we have in the past to sustain our operations and quality of service.

We recognize these fee increases come when our clients face numerous challenges and financial pressures. We wish we could avoid increasing our fees, and we hope an upfront and transparent fee increase today will help you plan for the upcoming year more effectively.

In conjunction with this letter, we are sending the Notice of Terms Supplement, which outlines our fees for the upcoming fiscal year. Please don’t hesitate to contact me ([alandecker@exed.org](mailto:alandecker@exed.org)) or Tait Anderson ([tanderson@exed.org](mailto:tanderson@exed.org)) if you have any questions or want to discuss this fee increase.

We truly value our long-term partnership with your organization and take pride in what our teams have achieved, collectively and individually, on behalf of California students.

With gratitude,

Anita Landecker  
President & CEO



**Excellent Education Development Management and Accounting Services Agreement -  
NOTICE OF TERMS SUPPLEMENT**

Reference is made to that certain Excellent Education Development Management and Accounting Services Agreement between YPI Charter Schools, Inc, a California nonprofit public benefit corporation (“Client”), and Excellent Education Development (“ExED”), a California nonprofit public benefit corporation, dated the 30th day of June 2021 (the “Agreement”). Capitalized terms not defined herein shall have the meanings set forth in the Agreement.

Unless a Notice of Non-Renewal is received by ExED within 60 days of the date hereof, the Agreement Term is hereby extended for a period of one year from June 30th of the year in which this Notice of Terms Supplement (“Notice”) is delivered, on the same terms and conditions as contained in the Agreement and as modified by any prior Notices, except as expressly set forth below.

**1. SERVICE FEES AND RELATED EXPENSES.**

a. ExED’s fees and related charges are hereby amended, modified and/or supplemented as follows:

(i) Effective July 1<sup>st</sup> of the current year, ExED’s fees are hereby increased as follows:

- (1) Basic Services: \$20,833.33 per month (i.e., \$250,000 per annum)
- (2) CALPADS Reporting Services: \$3,325.00 per month (i.e., \$39,900 per annum)

(ii) Effective July 1st of the current year, ExED’s other fees are increased as follows:

- (1) Budgeting
  - a. Budgets for new charter petitions \$3,500
- (2) Financial Management, Reporting, and Forecasting
  - a. Facility financing work (per hour) \$140
- (3) Accounting and Bookkeeping
  - a. Rush checks (per check) \$37
- (4) Payroll Processing and Retirement Reporting
  - a. Late payroll submission (per pay period) \$135
  - b. Supplemental payroll (per check) \$53
  - c. Prior pay period adjustment (per employee) \$320
  - d. STRS or PERS audit corrections (per hour) \$140
- (5) Compliance and Data Management
  - a. Monthly attendance (per month revised) \$115
  - b. Prior year P-2 adjustment \$320
  - c. CALPADS UPC adjustment \$565

(6) The Supplemental Fee Schedule (per hour)

- a. VP or Director \$140
- b. Manager \$80
- c. Other Staff \$52

(iii) Effective July 1st of the current year, ExED will introduce the following fees for ExED’s Basic Services:

- (1) ExED will provide mid-year orientation workshops (e.g., attendance reporting, nutrition claims reporting) for Client staff who are hired mid-year. ExED will charge Client \$210 per workshop.

(iv) Effective July 1st of the current year, the fees for ExED’s additional CALPADS Reporting Services are increased as follows:

- (1) Client transitions to a new SIS - 1 School
  - a. Transition to Aeries or PowerSchool \$3,250
  - b. Transition to Another SIS \$5,400
- (2) Client transitions to a new SIS – 2+ Schools
  - a. Transition to Aeries or PowerSchool \$6,500
  - b. Transition to Another SIS \$10,800
- (3) CALPADS mid-year orientation workshops (per workshop): \$210
- (4) The Supplemental Fee Schedule (per hour)
  - a. VP or Director \$140
  - b. Manager \$80
  - c. Other Staff \$52

2. **AGREEMENT IN FULL FORCE IN EFFECT; NOTICE OF NON-RENEWAL REQUIRED TO TERMINATE.**

- a. The Agreement remains in full force and effect, on its original terms and conditions, except as may be modified by this (and any prior) Notices. The Agreement, together with this Notice (and any prior Notices) shall be taken together and construed as the complete agreement of the parties. If Client does not wish to extend the Term of the Agreement as described in this Notice, Client is required by the terms of the Agreement to deliver a Notice of Non-Renewal to ExED no later than 60 days from the date of this Notice.

We thank you for your continued collaboration,

ExED:

By:     *Tait G. Anderson*    

Dated:     May 3, 2023    ,

Name:     Tait G. Anderson    

Title:     Executive Vice President



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Ruben Duenas  
Chief Operations Officer

**SUBJECT: Recommendation to approve continued membership in CharterSAFE for Workers' Compensation Insurance & Employer's Liability Coverage and Property & Liability Insurance**

### BACKGROUND

As per our charter renewals, all YPI Charter schools are required to carry Workers' Compensation Insurance in accordance with provisions of the California Labor Code adequate to protect the organization from claims that may arise from our operations pursuant to the Workers' Compensation Act. Workers' Compensation Insurance coverage must also include Employer's Liability coverage.

Additionally, the school must carry Property and Liability Insurance which includes coverage for Crime Insurance, Cyber Liability, Professional Educator's Errors and Omissions Liability coverage, Sexual Molestation and Abuse coverage, Employment Practices Legal Liability coverage, and excess/umbrella insurance. The YPI Charter Schools have been a member of the CharterSAFE Joint Powers Authority (JPA) since the JPA was established.

### ANALYSIS

The YPI Charter Schools have been a member of the CharterSAFE Joint Powers Authority (JPA) since 2012. Premiums have remained cost-effective, and customer assistance and support are consistently excellent. The premium for 2023-2024 is **\$217,881**.

Additionally, YPICS obtains Property and Liability (P & L) through the JPA. In this new world of AB 218 (Child Sexual Assault), catastrophic wildfire devastation, and COVID-19, P & L insurance has seen a dramatic increase as insurance carriers leave California and options are few. We are fortunate to belong to a JPA which belongs to SELF. This excess layer of insurance has increased but CharterSafe has brought it within the CharterSAFE umbrella of insurance and has

been able to spread the cost over multiple insurance layers to keep costs down. Due to the current insurance environment, next year we should expect to see substantial rate increases for 2024-2025.

**RECOMMENDATION**

It is recommended that the Board of Directors approve continuing to purchase Workers’ Compensation Insurance & Employer’s Liability coverage and Property & Liability Insurance (which includes all the insurances listed above) from CharterSAFE.



6/23/2023

**Member Contribution Submission  
2023-2024 Policy Year**

Submission Number: 000167

<b>Policyholder Name: YPI Charter Schools</b>		<b>ID: 10097</b>
Servicer	Egan	
Primary Contact	Ruben A. Duenas	
Primary Contact Email	rduenas@ypics.org	
Legal Name (DBA)	YPI Charter Schools, Inc.	
Policy Type Proposed	A	
Policy Year effective date	07/01/2023	
Final Proposal Date	05/30/2023	
Liability & Property Package Premium	\$155,875.00	
Workers' Compensation and Employer's Liability Premium	\$62,006.00	
Total Premium	<b>\$217,881.00</b>	
Deposit Amount	\$54,470.00	
Installment Amount	\$18,157.00	
Payment Option	Payment in Full	
Proposal Accepted By Name	Ruben Dueñas	
Proposal Accepted By Title	Chief Operartions Officer	
Proposal Accepted Date	06/23/2023	



**Member Contribution Submission**  
**2023-2024 Policy Year**

Submission Number: 000167

<b>Policyholder Name: YPI Charter Schools</b>	<b>ID: 10097</b>
---	------------------

Servicer	Egan
Primary Contact	Ruben A. Duenas
Primary Contact Email	rduenas@ypics.org
Legal Name (DBA)	YPI Charter Schools, Inc.
Policy Type Proposed	A
Policy Year effective date	07/01/2023
Final Proposal Date	05/30/2023
Liability & Property Package Premium	\$155,875.00
Workers' Compensation and Employer's Liability Premium	\$62,006.00
Total Premium	\$217,881.00
Deposit Amount	\$54,470.00
Installment Amount	\$18,157.00
Payment Option	Payment in Full
Proposal Accepted By Name	Ruben Dueñas
Proposal Accepted By Title	Chief Operartions Officer
Proposal Accepted Date	06/23/2023



## YPIC CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Ryan Bradford  
YPICS Director of Technology and Integration

**SUBJECT: Recommendation to approve E-Rate Consulting Renewal Proposal for Fiscal Year 2023-2024 from Learningtech.org**

### BACKGROUND

Learningtech.org has been our E-Rate consultant since Mr. Duenas and Ms. King-Berg arrived at BCCS in 2006. E-Rate was a new and unknown federal program with seemingly unlimited potential, but neither knew how to access the plan to its fullest potential. Mr. Harvey was also hired in 2006 and continued to lead this effort until Mr. Bradford took over Mr. Harvey's role as Director of Technology and Integration. Today, Mr. Bradford and the YPICS Board Tech Committee, chaired by Board Member Dean Cho have continued to provide strong guidance and support to the excellent YPICS tech plan.

### ANALYSIS

Mark Miller and his team at Learningtech.org, including his sister Eileen Miller, have provided exceptional service at an exceptionally low cost to first Bert Corona Charter School, then to Monseñor Oscar Romero Charter School (while the school was still a concept without a location or any hope of construction), and finally Bert Corona Charter High School. For nearly seventeen years, federal funding has been leveraged to the maximum extent to ensure YPICS students have enjoyed high-speed Internet access that other schools only hoped for.

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 across California. The labor rate schedule is attached for board review.

## **RECOMMENDATION**

It is recommended that the Board of Directors approve the renewal of the Learningtech.org E-Rate Consulting Proposal for Fiscal Year 2023-2024.

**Attachment:** *E-Rate Consulting Renewal Proposal*





**Learningtech.org**<sup>®</sup>

The Miller Institute for Learning with Technology

**E-Rate Consulting Renewal Proposal  
Fiscal Year 2023-2024 / E-Rate Funding Year 2024-2025  
YPI Charter Schools**

Learningtech.org appreciates the opportunity to provide E-Rate Consulting Services to your organization. During the past months, we facilitated Category 1 application(s) that requested a total of **\$74,502** and Category 2 application(s) that requested a total of **\$12,898** in E-Rate discounts for Funding Year 2023-2024 [FY2023] (7/1/2023 – 6/30/2024).<sup>1</sup>

We look forward to continuing our relationship and anticipate providing E-Rate Management Services for FY2024 (7/1/2024 – 6/30/2025) to your organization during fiscal year 2023 – 2024 (7/1/2023 – 6/30/2024), consistent with the attached **Scope of Work**.

**Consistent with Paragraph 2 of the existing Consulting Agreement**, our current contract automatically renews annually through 6/30/26. Further, this renewal proposal notifies Client of a need for other modifications, and includes the following considerations.

**Key Assumptions:**

- One (1) Category 1 application for services with continuing contracts (as needed)
- One (1) Category 1 application for newly competed and awarded services (as needed)
- One (1) Category 2 application for services with continuing contracts (as needed)
- On-going E-Rate management services to follow-up on funding requests for up to two prior funding years
- All work to be completed for each service will be summarized in an **E-Rate FY2024 PLANNING RECAP**. Work will begin for each service upon Client approval signature
- A separate consulting fee applies for additional schools or sites; please notify us immediately if a new school or site is opening in the next year
- A separate consulting fee applies for competitive bidding and application for new Category 2 products/services (e.g., equipment to facilitate Internal Connections, Basic Maintenance of Internal Connections, Managed Internal Broadband Services for leased or purchased equipment); please request a quote if you intend to pursue Category 2 funding
  - Category 2 Pre-discount 5-year Budget remaining through 6/30/2025 is **\$60,708**
- **Client will complete the E-Rate planning process, including Client approval signature on the E-Rate FY2024 PLANNING RECAP for each service by 10/4/23.** Work will begin on each application only upon Client approval signature on the related Planning Recap
  - Should Client approval be delayed for any Planning Recap beyond 10/4/23, a completion delay fee of 20% of the service fixed fee will be assessed for each unsigned Planning Recap

---

<sup>1</sup> Additional California Teleconnect Fund [CTF] discounts are also anticipated for eligible Category 1 services for California applicants.

- Should Client approval be delayed beyond 11/15/23, an *incremental* completion delay fee of 25% of the service fixed fee will be assessed for each unsigned Planning Recap
- After 12/13/23:
  - Work will begin *after* all other client work is completed. Learningtech.org will make best efforts to meet the application deadline, but without a guarantee of timely filing
  - Follow-up on funding requests for up to two prior funding years will continue

**Fees:**

- The annual Fixed Fee amount is **\$10,780** and includes an adjustment for inflation
- 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
- Change fees may also apply should Client require changes after signing Planning Recap(s)
- At Client's preference, the Fixed Fee is payable:
  - In a single payment with 2% discount if paid by check/Automated Clearing House [ACH] within 10 days of invoice date, or
  - In 3 installments; we will assume you prefer installments unless we receive payment in full (less the 2% discount) within ten days of sending our invoice
- Invoices will be copied to Client's E-Rate distribution list (erate.ypi@learningtech.org)
- Late fees and/or finance charges up to the maximum amounts allowed by law shall be applied to past due accounts

**Discount Offerings:**

- Clients who refer new business to Learningtech.org that result in a new contracted client by 10/4/23 will receive \$300 credit on their next invoice
- Clients who establish ACH for invoice payments by 7/1/23 will receive a one-time \$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.

<u>The Miller Institute for Learning with Technology</u>	<u>YPI Charter Schools</u>
<i>Authorized Representative For Consultant</i>	<i>Authorized Representative For Client</i>
<u>Mark L. Miller, Ph.D.</u>	
<i>Name</i>	<i>Name</i>
<u>President and Executive Director</u>	
<i>Title</i>	<i>Title</i>
<u><i>Mark L. Miller</i></u>	
<i>Signature</i>	<i>Signature</i>
<u>5/27/2023</u>	
<i>Date</i>	<i>Date</i>



**Learningtech.org**<sup>®</sup>

The Miller Institute for Learning with Technology

## Scope of Work – E-Rate Management Services

### Learningtech.org will provide:

- E-Rate application preparation and compliance assistance services for the upcoming E-Rate funding year for these applications, as needed:
  - One (1) Category 1 application for services with continuing contracts
  - One (1) Category 1 application for newly competed and awarded services
  - One (1) Category 2 application for services with continuing contracts
- On-going E-Rate management services to follow-up on funding requests for up to two prior funding years

### Application preparation and management services include:

- Confirmation that all needed administrative foundations are current (e.g., Entity Numbers, Letter(s) of Agency, E-Rate Productivity Center [EPC], FCC Registration Numbers, System for Award Management [SAM.gov])
- Planning and documentation relevant to required forms
- Management of a fair and open competitive bidding process, complying with federal, state, and local procurement rules, if needed
- Adherence to all E-Rate program rules and deadlines
- Submission of required forms (470, 471, 486, 472/474)
- Interface with E-Rate program (e.g., Program Integrity Assurance [PIA])
- Interface with service providers to facilitate processing of discounts
- Quality assurance on every published document and form
- Backup electronic document retention<sup>1</sup>

### Incremental fees apply for:

- More schools or sites than initially proposed/agreed upon, or since last year
- Category 2 competitive bidding and application for new products/services (e.g., equipment to facilitate Internal Connections, Basic Maintenance of Internal Connections, Managed Internal Broadband Services for leased or purchased equipment)

### Client will provide:

- **Information, including Client approval signature, required to complete the E-Rate FY2024 Planning Recap,<sup>2</sup> by 10/4/23**
- Client Representatives form verified/updated annually, or as changes occur, including a primary and an alternate contact with valid email addresses and cell numbers
- Full access to the Applicant's E-Rate accounts for online systems (e.g., EPC)

---

<sup>1</sup> The *Applicant* is responsible for document retention for ten years from the last date of service. Consultant's electronic document retention provides backup.

<sup>2</sup> The E-Rate FY2024 Planning Recap(s) for (Funding for dates of service 7/1/2024 – 6/30/2025) summarizes planning meetings, and any follow-up conversations or emails. These documents govern all subsequent E-Rate actions Learningtech.org will execute on behalf of Client for the upcoming E-Rate funding year.

- **Prompt** response to routine document/information requests (without reminders). Items that may be requested of Client (Learningtech.org can help identify the appropriate documents) include but are not limited to:
  - Student enrollment and NSLP counts
  - Technology budget information required by program rules
  - Copies of service provider invoices and countersigned contracts
  - List of current technology vendors
  - Bid evaluation scores/decisions, signatures on vendor contracts and implementation documents (when competitive bidding is needed)
- Payments to Learningtech.org on time, so that dunning is not required
- Sufficient opportunity to Learningtech.org to review every document relating to E-Rate eligible products/services, before signing (critical to ensuring compliance)

### Additional Services

Because they occur infrequently, the following services are *not* budgeted for in the routine E-Rate Management Services Scope of Work. These Additional Services are available at extra cost on a time and materials basis according to our *Labor Rate Schedule* and include:

- Filing of Waivers or Appeals or managing pending Appeals
- Recovery of Prior Year funds for special circumstances (e.g., invoice deadline missed)
- LAN, WAN, or WLAN network design in preparation for E-Rate
- Consultation on overall technology strategy, engineering design, curricular or pedagogical considerations
- Technology Plan development or revisions
- Professional Learning for client staff regarding E-Rate program or other topics
- Learningtech.org attendance/participation in Client board meetings
- High Scrutiny events (e.g., High Cost Review, On Site Audit, Selective Review, Competitive Bidding Review, Review of “budgeted amount allocated to resources not eligible for E-Rate support,” more than 2 rounds of PIA per FRN, any review involving law enforcement)
- On site visits (e.g., vendor walk-throughs), unless explicitly included in proposal
- Support with implementation of services (e.g., planning of rollout to multiple sites, service installation support), including modest travel arrangements as needed
- Assistance beyond routine checks with other funding sources (e.g., CTF, ECF)
- Special Construction or installment arrangements on large C2 projects
- Audits (e.g., review to help ensure appropriate document retention, USAC Beneficiary and Contributor Audit Program [BCAP], USAC Payment Quality Assurance [PQA])
- Compliance with Child Internet Protection Act [CIPA] requirements beyond routine review of current status and documentation
- Follow-up on funding requests from prior funding years more than two funding years old
- Addressing major historical problems (e.g., if a prior year application had significant flaws not caused by Learningtech.org)
- Complex Service Substitutions, Operational SPIN Changes (e.g., due to changes of plans, bankruptcy/failed performance of service provider)
- Change Order or “do over” of work already completed due to change of applicant circumstances or preferences

- Additional applications during special E-Rate windows that are separate from the main annual application window

Additional Services will be provided only if needed, requested, and approved, then charged for on a time and materials basis – in addition to any normally applicable fixed fees – according to the following **Labor Rate Schedule**. For all services outside of the Scope of Work, these hourly rates apply. Normally, the only “materials costs” would be in situations where Learningtech.org personnel must travel to the school/district site.

### **Labor Rate Schedule**

*Hourly Rates, Applicable to E-Rate Extra Cost Services, Time and Materials Projects or Project Elements  
Effective through June 30, 2024; Annually adjustable to reflect inflation on July 1*

Category	Rate
Complex Consultations (Chief Technical Officer)	\$300.00
Vice Presidents; Server Installation/Configuration; Network Design, Complex Troubleshooting; Cabling Installation Supervision; Senior Instructor; Complex Web Programming; Complex Data Manipulation	\$245.00
E-Rate Application Support; Tech Plan Preparation Assistant; Instructor	\$190.00
Most Desktop/Laptop/Tablet/Phone Technical Support; Back Office Support; Static Web Page Creation/Editing; Assistant Instructor	\$120.00
Administrative or Clerical Support; Routine Data Entry; Most Intern Labor	\$70.00



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

### **Recommendation to approve continued membership in California Charter Schools Association**

#### **BACKGROUND**

The California Charter Schools Association (CCSA) was established in 2003 as the membership and advocacy organization serving California charter schools.

#### **ANALYSIS**

After years of maintaining the membership dues at the same level (\$5.00 per student), the Board of Directors of CCSA approved an increase to be phased in over two years: in 2017-2018, membership dues were increased by \$3.00 to \$8.00 per student, and in January 2019, dues were increased an additional \$2.00 per student to \$10 for the FY2022.

In July 2022, CCSA will transition to a fiscal year billing cycle and invoice \$12.50 per student for FY2023. Another \$2.50 per student increase will take effect in July 2023, increasing the FY2024 price to \$15.00 per student. An annual \$0.50 increase begins in FY2025 (only if a COLA is funded for K-12, per the Budget Act.)

#### **RECOMMENDATION**

It is recommended that the Board of Directors approve continued membership in the California Charter Schools Association at a cost of \$15.00 per student and an approximate total cost of \$12,210.00 for FY2024 only with future and continued membership (and fees) to be determined by the board.

**Attachment:** *CCSA Membership Invoice FY 2024*



**California  
Charter Schools  
Association**

PO Box 86087 Los Angeles, CA 90086 • www.ccsa.org

Attn: Accounts Payable  
Youth Policy Institute Charter Schools  
9400 Remick Ave.  
Pacoima, CA 91331

**Membership Invoice**

<b>Date</b>		<b>Member ID</b>	
6/6/23		A-03332	
<b>Member Type</b>	<b>Expiration Date</b>	<b>Due Date</b>	
C-Charter School	6/30/2024		
<b>Description</b>		<b>Number of Students</b>	<b>Amount</b>
A-06096	Monsenor Oscar Romero Charter Middle Charter School Membership Dues	277	\$4,155.00
A-02844	Bert Corona Charter Charter School Membership Dues	337	\$5,055.00
A-09765	Bert Corona Charter High Charter School Membership Dues	200	\$3,000.00
		<b>Total Amount Due:</b>	<b>\$12,210.00</b>
		Amount Paid:	\$0.00

**We appreciate your support and participation! Please email [membership@ccsa.org](mailto:membership@ccsa.org) with any questions.**

**REMITTANCE STUB**  
(Please Return)

**Initial Billing** Membership through 6/30/2024 at the rate of \$15.00 a student.

Please make checks payable to the California Charter Schools Association. Mail or fax payment to:

Member ID: A-03332  
Youth Policy Institute Charter Schools  
9400 Remick Ave.  
Pacoima, CA 91331

California Charter Schools Association  
PO Box 86087 Los Angeles, CA 90086

**Payment Method:** You can pay by credit card in the member portal. If you have questions or to update your student count please email [membership@ccsa.org](mailto:membership@ccsa.org)

**Pay by Wire:**





California  
Charter Schools  
Association

PO Box 86087 Los Angeles, CA 90086 • [www.ccsa.org](http://www.ccsa.org)

City National Bank  
Account #: 401599797  
Account Name: California Charter Schools  
Association  
Bank Routing #: 122016066  
Swift Code: CINAUS6L  
EIN: 51-0465703

Link to [W-9](#)



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yesenia Zubia  
Coordinator of Human Resources

### **Recommendation to approve revised YPICS Employee Handbook**

#### **BACKGROUND**

The Employee Handbook was first developed using a template received from an attorney working with our founding organization in 2004 and the first handbook was developed for Bert Corona Charter School. Since then, a team that includes the YPICS Executive Administrators, some YPICS Directors, and the YPICS Coordinator of Human Resources along with the YPICS Chief Operations Officer and Executive Director, who gather feedback from staff and teachers throughout the year to be considered for the next Employee Handbook update. The YPICS Employee Handbook has been revised regularly to ensure current regulations, laws, and employment practices are included. Every final draft has been reviewed by our legal partners to ensure that the handbook is consistent with current law.

#### **ANALYSIS**

The revisions to the Employee Handbook reflect updates to YPICS policies, practices and procedures approved by the Board during the 2022-2023 school year and changes to federal and state employment practices.

#### **RECOMMENDATION**

It is recommended that the Board of Directors approve the revised YPICS Employee Handbook.

**Attachment:** *Revised YPICS Employee Handbook*



# YPI CHARTER SCHOOLS EMPLOYEE HANDBOOK

AUGUST 2023



**ACKNOWLEDGMENT OF RECEIPT OF CHARTER SCHOOL EMPLOYEE HANDBOOK**

By signing this Acknowledgement of Receipt, I acknowledge that I have received a copy of the Employee Handbook of Bert Corona Charter School, Monseñor Oscar Romero Charter School, and Bert Corona Charter High School and read the handbook in its entirety. I understand that I am responsible for knowing and adhering to the policies set forth in the handbook during my employment. I understand that I am employed by either Bert Corona Charter School, Monseñor Oscar Romero Charter School, or Bert Corona Charter High School and this acknowledgment will use the term "Charter School" to refer to the school for which I work.

I understand that the policies contained in the handbook are not intended to create any contractual rights or obligations, express or implied. I further understand that, with the exception of the Charter School's at-will employment policies, the Charter School reserves the right to amend, interpret, modify, or withdraw any portion of this handbook at any time.

I further understand and agree that, unless I have entered into a valid written employment agreement providing otherwise, my relationship with the Charter School is at-will, which means that my employment is for no definite time period and may be terminated by me or by the Charter School at any time, with or without advance notice and with or without cause. I also understand that the Charter School may demote or discipline me or alter the terms of my employment at any time, with or without advance notice and with or without cause, in its sole discretion. I understand that in the absence of a writing signed by me and by the Executive Director (as an agent for the Board of Directors) which expressly alters the at-will nature of my employment, no policy, practice, procedure, statement, or action of the Charter School or any individual at the Charter School may alter, modify, or waive the at-will nature of employment with the Charter School in any way or at any time.

I further acknowledge that this handbook supersedes all previous handbooks, policies or guidelines issued. However, I understand and agree that if the terms of this Acknowledgement are inconsistent with any Charter School guideline, practice, manuals or rules, the terms of this Acknowledgement shall control. I understand that if I have any questions about a Charter School policy, I should contact the Charter School's Director, the Executive Director or the Human Resources contact.

Finally, I acknowledge that no one has made any promises or commitments to me contrary to the foregoing. I agree that this Acknowledgment supersedes all previous agreements, whether written or oral, express or implied, relating to the subjects covered in the Acknowledgment.

Employee name (print): \_\_\_\_\_

Employee signature): \_\_\_\_\_

Today's date): \_\_\_\_\_

**Please sign/date, tear out, and return to the School, and retain this Handbook for your reference.**

## Table of Contents

<b>INTRODUCTION TO HANDBOOK</b>	<b>1</b>
<b>CONDITIONS OF EMPLOYMENT</b>	<b>2</b>
Equal Employment Opportunity Is Our Policy	2
Employment At-Will	2
Employment Agreements	3
Child Abuse and Neglect Reporting	3
Criminal Background Checks	3
Tuberculosis Testing	3
Immigration Compliance	4
Professional Boundaries: Staff/Student Interaction Policy	4
Corporal Punishment	4
Acceptable and Unacceptable Staff/Student Behavior	4
Duty to Report Suspected Misconduct	5
Unacceptable Staff/Student Behaviors (Violations of this Policy)	5
Unacceptable Staff/Student Behaviors without Parent and Supervisor Permission	5
Cautionary Staff/Student Behaviors	5
Acceptable and Recommended Staff/Student Behaviors	6
Policy Prohibiting Unlawful Harassment, Discrimination, and Retaliation	6
Prohibited Unlawful Harassment	7
Prohibited Unlawful Sexual Harassment	7
Consensual Relationships	8
Policy Concerning Violence in the Workplace	8
Workplace Violence Defined	9
Complaint Procedure	9
Ensuring A Secure Workplace	9
Whistleblower Policy	10
Drug and Alcohol Free Workplace Policy	10
Illegal Drugs and Controlled Substances	10
Legal Drugs	10
Alcohol	11
Disciplinary Action	11
Criminal Convictions	11
Off-the-Job Conduct	11
Confidentiality of Drug Use Disclosures	11
Drug-Free Awareness Program	12
Confidentiality of Information	12

Conflict of Interest	12
No Smoking	12
<b>THE WORKPLACE</b>	<b>13</b>
Employee Classifications	13
Work Schedule	13
Scheduling	14
Meal and Rest Periods	14
Lactation Accommodation	14
Attendance and Tardiness	14
Use of Charter School Technology and Other School Property	15
School Property	15
Use of Technology Resources	15
Personal Use of School Property and Technology Resources	16
The Charter School’s Right to Access and Inspect School Property and Technology Resources	16
Cellular Phone Use and Electronic Wireless Communication Policy	16
Return of School Property and Technology Resources	17
Personal Business	17
Social Media	17
Dress Code	18
Health and Safety Policy	22
Security Protocols	24
Occupational Safety	24
Accident/Incident Reporting	24
Reporting Fires and Emergencies	24
<b>EMPLOYEE WAGES AND HEALTH BENEFITS</b>	<b>25</b>
Payroll Withholdings	25
Overtime Pay	25
Makeup Time	25
Paydays	26
Wage Attachments and Garnishments	26
Health Care Benefits	26
Retirement Benefits	27
Life Insurance	27
COBRA Benefits	27
<b>PERSONNEL EVALUATION AND RECORD KEEPING</b>	<b>29</b>
Performance Evaluations	29
Personnel Files and Record Keeping Protocols	29
<b>HOLIDAYS, VACATIONS AND LEAVES</b>	<b>30</b>
Holidays	30

Vacation	30
Eligibility and Accrual	30
All Other Employees	30
Vacation Cap	30
Compensation for Vacation	31
Vacation Approval and Scheduling	31
Unpaid Leave of Absence	31
Sick Leave	31
Eligibility and Accrual	31
Use	32
Requesting Sick Leave	32
Coordination of Sick Leave Benefits With Other Benefits	32
Personal Necessity Leave	32
Family Care and Medical Leave	33
Employee Eligibility Criteria	33
Events That May Entitle an Employee to FMLA/CFRA Leave	33
Amount of FMLA/CFRA Leave Which May Be Taken	34
Pay during FMLA/CFRA Leave	34
Health Benefits	34
Seniority	35
Medical Certifications	35
Procedures for Requesting and Scheduling FMLA/CFRA Leave	35
Return to Work	36
Employment during Leave	36
Pregnancy Disability Leave	36
Employee Eligibility Criteria	36
Events That May Entitle an Employee to Pregnancy Disability Leave	37
Duration of Pregnancy Disability Leave	37
Pay during Pregnancy Disability Leave	37
Health Benefits	37
Seniority	38
Medical Certifications	38
Requesting and Scheduling Pregnancy Disability Leave	38
Return to Work	38
Employment during Leave	39
Industrial Injury Leave (Workers' Compensation)	39
Military and Military Spousal Leave of Absence	40
Bereavement Leave	40
Jury Duty or Witness Leave	41
Voting Time Off	41

School Appearance and Activities Leave	41
Bone Marrow and Organ Donor Leave	42
Victims of Abuse Leave	42
Returning from Leave of Absence	43
<b>DISCIPLINE AND TERMINATION OF EMPLOYMENT</b>	<b>44</b>
Rules of Conduct	44
Off-Duty Conduct	46
Termination of Employment	46
Verification and Reference Policy	47
<b>INTERNAL COMPLAINT REVIEW</b>	<b>48</b>
Open Door Policy	48
Internal Complaints	48
Policy for Complaints Against Employees	48
General Requirements	49
<b>AMENDMENT TO EMPLOYEE HANDBOOK</b>	<b>50</b>
<b>APPENDIX A</b>	<b>1</b>
<b>HARASSMENT/DISCRIMINATION/RETALIATION COMPLAINT FORM</b>	<b>1</b>
<b>INTERNAL COMPLAINT FORM</b>	<b>3</b>



## INTRODUCTION TO HANDBOOK

### Welcome!

This Employee Handbook has been written to provide you with an overview of YPI Charter Schools Bert Corona Charter School (BCCS), Monseñor Oscar Romero Charter School (MORCS), and Bert Corona Charter High School (BCCHS), their personnel policies and procedures, and your benefits as an employee. All individuals are employed either by BCCS, MORCS, or by BCCHS, and this handbook will use the term “Charter School” to refer to the school for which you work.

This handbook is intended to explain in general terms those matters that most often apply to your day-to-day work activities. This handbook cannot anticipate every situation or answer every question about employment, and is not an employment contract. In order to retain necessary flexibility in the administration of its policies, procedures and benefits, the Charter School reserves the right to change, deviate from, eliminate, or revise them without notice, except for the at-will policy, whenever the Charter School determines that such action is warranted. For these reasons, we urge you to check with Human Resources to obtain current information regarding the status of any particular policy, procedure or practice. These guidelines supersede and replace all previous personnel policies, practices and procedures.

Employees are expected to read this handbook thoroughly upon receipt and to know and abide by the policies outlined herein, as revised over time, throughout their employment.

Information about your employment also can be found in your school’s charter petition/charter. Where there is conflicting language between the charter petition/charter and this handbook, the handbook shall control. If you have any questions about this handbook or any other policy or procedure, please contact your Lead-Site Administrator, the Chief Operations Officer, or the Human Resources contact. Your current Human Resources contacts are **Executive Administrators with the support of the Senior Director of Programs and Human Resources, Diana Gamez. The Coordinator of Human Resources provides administrative support to this team.** Because the Human Resources contact is subject to change, please ask the Charter School’s Director or the Executive Director for updated information, if necessary.

## CONDITIONS OF EMPLOYMENT

### Equal Employment Opportunity Is Our Policy

The Charter School is an equal opportunity employer. It is the policy of the School to afford equal employment and advancement opportunity to all qualified individuals without regard to:

- Race (including traits historically associated with race, such as hair texture and hairstyle, including but not limited to braids, locks, and twists);
- Color;
- Gender (including gender identity, gender expression, and transgender identity, whether or not the employee is transitioning or has transitioned);
- Sex (including reproductive health decision-making, pregnancy, childbirth, breastfeeding, and medical conditions related to such);
- Sex stereotype (including an assumption about a person's appearance or behavior, gender roles, gender expression, or gender identity, or about an individual's ability or inability to perform certain kinds of work based on a myth, social expectation, or generalization about the individual's sex);
- Religious creed (including religious dress and grooming practices);
- Marital/registered domestic partner status;
- Age (forty (40) and over);
- National origin or ancestry (including native language spoken and possession of a driver's license issued to persons unable to prove their presence in the U.S. is authorized by federal law);
- Physical or mental disability (including HIV and AIDS);
- Medical condition (including cancer and genetic characteristics);
- Taking of a leave of absence pursuant to the Family Medical Leave Act ("FMLA"), Pregnancy Disability Leave ("PDL") law, Americans with Disabilities Act ("ADA"), California Family Rights Act ("CFRA"), the Fair Employment and Housing Act "FEHA"), or laws related to domestic violence, sexual assault and stalking;
- Genetic information;
- Sexual orientation;
- Military and veteran status; or
- Any other consideration made unlawful by federal, state, or local laws.

This policy extends to all job applicants and employees and to all aspects of the employment relationship, including the hiring of new employees and the training, transfer, promotion, discipline, termination, compensation and benefits of existing employees.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the School will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact a School representative with day-to-day personnel responsibilities and request such an accommodation. The individual with the disability should specify what accommodation he or she needs to perform the job, or if unknown, what job duties the disability impairs. The Charter School will then conduct an investigation to identify the barriers that interfere with the equal opportunity of the applicant or employee to perform the job. The Charter School will identify possible accommodations, if any, that will help eliminate the limitation. If the accommodation is reasonable and will not impose an undue hardship, the School will make the accommodation.

### Employment At-Will

Except if stated expressly otherwise by employment contract, it is the policy of the School that all employees are considered "at-will" employees of the School. Accordingly, either the School or the employee can terminate this relationship at any time, for any reason, with or without cause, and with or without advance notice.

Nothing contained in this Handbook, employment applications, School memoranda or other materials provided to employees in connection with their employment shall require the School to have "cause" to terminate an employee or otherwise restrict the School's right to release an employee from their at-will employment with the School. Statements of specific grounds for termination set forth in this Handbook or elsewhere are not all-inclusive and are not intended to restrict the School's right to terminate at-will. No School representative, other than the Board of Directors or its designee, is authorized to modify this policy for any employee or to make any representations to employees or applicants concerning the terms or conditions of employment with the School that are not consistent

with the School's policy regarding "at-will" employment.

This policy shall not be modified by any statements contained in this Handbook or employee applications, School memoranda, or any other materials provided to employees in connection with their employment. Further, none of those documents whether singly or combined, or any employment practices, shall create an express or implied contract of employment for a definite period, nor an express or implied contract concerning any terms or conditions of employment.

## **Employment Agreements**

Some employees may have entered into an employment agreement with the Charter School. Their employment with the Charter School is governed by both their employment agreement and this handbook. To the extent that any term of an employee's employment agreement is inconsistent with a provision in this handbook, the employment agreement controls.

## **Child Abuse and Neglect Reporting**

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident.

The Charter School will provide annual training on the mandated reporting requirements, using the online training module provided by the State Department of Social Services, to employees who are mandated reporters. Mandated reporter training will also be provided to employees hired during the course of the school year. This training will include information that failure to report an incident of known or reasonably suspected child abuse or neglect, as required by Penal Code section 11166, is a misdemeanor punishable by up to six (6) months confinement in a county jail, or by a fine of one-thousand dollars (\$1,000), or by both that imprisonment and fine.

All employees required to receive mandated reporter training must provide proof of completing the training within the first six (6) weeks of each school year or within the first six (6) weeks of that employee's employment.

By acknowledging receipt of this Handbook, employees acknowledge they are child care custodians and are certifying that they have knowledge of California Penal Code section 11166 and will comply with its provisions.

## **Criminal Background Checks**

As required by law, all individuals working or volunteering at the School will be required to submit to a criminal background investigation. No condition or activity will be permitted that may compromise the School's commitment to the safety and the well-being of students taking precedence over all other considerations. Conditions that preclude working at the School include conviction of a controlled substance or sex offense, or a serious or violent felony. Additionally, should an employee be arrested for, charged with, or convicted of any offense during his/her employment with the School, the employee must immediately report as much to the Executive Administrator.

## **Tuberculosis Testing**

All employees of the School must submit written proof from a health care provider of a risk assessment examination for tuberculosis (TB) within the last sixty (60) days. If TB risk factors are identified, a physician must conduct an examination to determine whether the employee is free of infectious TB. The examination for TB consists of an approved TB test, which, if positive, will be followed by an x-ray of the lungs, or in the absence of skin testing, an x-ray of the lungs. All employees will be required to undergo TB risk assessments and, if risk factors are found, the examination at least once every four (4) years. Volunteers may be required to undergo a TB examination as necessary. The TB risk assessment and, if indicated, the examination is a condition of initial employment with the School and the cost of the exam will be borne by the applicant.

Food handlers may be required to have annual TB exams. Documentation of employee and volunteer compliance with TB risk assessments and examinations will be kept on file in the office. This requirement also includes contract food handlers, substitute teachers, and student teachers serving under the supervision of an educator. Any entity providing student services to the School will be contractually required to ensure that all contract workers have had

TB testing that shows them to be free of active TB prior to conducting work with School students.

## **Immigration Compliance**

The Charter School will comply with applicable immigration law, including the Immigration Reform and Control Act of 1986 and the Immigration Act of 1990. As a condition of employment, every individual must provide satisfactory evidence of his or her identity and legal authority to work in the United States. However, the Charter School will not check the employment authorization status of current employees or applicants who were not offered positions with the School unless required to do so by law.

The Charter School shall not discharge an employee or in any manner discriminate, retaliate, or take any adverse action (*e.g.*, threatening to report the suspected citizenship or immigration status of an employee or a member of the employee's family) against any employee or applicant for employment because the employee or applicant exercised a right protected under applicable law. Further, the School shall not discriminate against any individual because he or she holds or presents a driver's license issued per Vehicle Code § 12801.9 to persons who have not established their federally-authorized presence in the United States. Finally, in compliance with the Immigrant Worker Protection Act, the School shall not allow a federal immigration enforcement agent to enter any nonpublic areas of the School without a judicial warrant, or voluntarily give consent to an agent to access, review or obtain employee records without a subpoena or judicial warrant. If a search of employee records is authorized by a valid subpoena or judicial warrant, the School will give employees notice of the inspection both before and after it has occurred as required by law.

## **Professional Boundaries: Staff/Student Interaction Policy**

The Charter School recognizes its responsibility to make and enforce all rules and regulations governing student and employee behavior to bring about the safest and most learning-conducive environment possible.

### Corporal Punishment

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of, or willfully causing the infliction of, physical pain on a student.

For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to property.

For clarification purposes, the following examples are offered for direction and guidance of School personnel:

- A. Examples of PERMITTED actions (NOT corporal punishment)
  - 1. Stopping a student from fighting with another student;
  - 2. Preventing a pupil from committing an act of vandalism;
  - 3. Defending yourself from physical injury or assault by a student;
  - 4. Forcing a pupil to give up a weapon or dangerous object;
  - 5. Requiring an athletic team to participate in strenuous physical training activities designed to strengthen or condition team members or improve their coordination, agility, or physical skills;
  - 6. Engaging in group calisthenics, team drills, or other physical education or voluntary recreational activities.
- B. Examples of PROHIBITED actions (corporal punishment)
  - 1. Hitting, shoving, pushing, or physically restraining a student as a means of control;
  - 2. Making unruly students do push-ups, run laps, or perform other physical acts that cause pain or discomfort as a form of punishment;
  - 3. Paddling, swatting slapping, grabbing, pinching, kicking, or otherwise causing physical pain.

### Acceptable and Unacceptable Staff/Student Behavior

This policy is intended to guide all School faculty and staff in conducting themselves in a way that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between

students and staff.

Although this policy gives specific, clear direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders. One viable standard that can be quickly applied, when you are unsure if certain conduct is acceptable, is to ask yourself, "Would I be engaged in this conduct if my family or colleagues were standing next to me?"

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing the boundaries of a student/teacher relationship is deemed an abuse of power and a betrayal of public trust.

Some activities may seem innocent from a staff member's perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct.

Staff must understand their own responsibility for ensuring that they do not cross the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interactions must have boundaries surrounding potential activities, locations and intentions.

### Duty to Report Suspected Misconduct

When any employee reasonably suspects or believes that another staff member may have crossed the boundaries specified in this policy, he or she must immediately report the matter to a school administrator. All reports shall be as confidential as possible under the circumstances. It is the duty of the administrator to investigate and thoroughly report the situation. Employees must also report to the administration any awareness or concern of student behavior that crosses boundaries or where a student appears to be at risk for sexual abuse.

Examples of Specific Behaviors:

The following examples are not an exhaustive list:

### Unacceptable Staff/Student Behaviors (Violations of this Policy)

- (a) Giving gifts to an individual student that are of a personal and/or intimate nature.
- (b) Kissing of any kind.
- (c) Any type of unnecessary physical contact with a student in a private situation.
- (d) Intentionally being alone with a student away from the school.
- (e) Making or participating in sexually inappropriate comments.
- (f) Sexual jokes.
- (g) Seeking emotional involvement with a student for your benefit.
- (h) Listening to or telling stories that are sexually oriented.
- (i) Discussing inappropriate personal troubles or intimate issues with a student in an attempt to gain their support and understanding.
- (j) Becoming involved with a student so that a reasonable person may suspect inappropriate behavior.

### Unacceptable Staff/Student Behaviors without Parent and Supervisor Permission

**(These behaviors should only be exercised when a staff member has parent and supervisor permission.)**

- (a) Giving students a ride to/from school or school activities.
- (b) Being alone in a room with a student at school with the door closed.
- (c) Allowing students in your home.

### Cautionary Staff/Student Behaviors

**(These behaviors should only be exercised when a reasonable and prudent person, acting as an educator, is prevented from using a better practice or behavior. Staff members should inform their supervisor of the**

**circumstance and occurrence prior to or immediately after the occurrence)**

- (a) Remarks about the physical attributes or development of anyone.
- (b) Excessive attention toward a particular student.
- (c) Sending emails, text messages or letters to students if the content is not about school activities

Acceptable and Recommended Staff/Student Behaviors

- (a) Getting parents’ written consent for any after-school activity.
- (b) Obtaining formal approval to take students off school property for activities such as field trips or competitions.
- (c) Emails, text, phone and instant messages to students must be very professional and pertaining to school activities or classes (Communication should be limited to school technology).
- (d) Keeping the door open when alone with a student.
- (e) Keeping reasonable space between you and your students.
- (f) Stopping and correcting students if they cross your own personal boundaries.
- (g) Keeping parents informed when a significant issue develops about a student.
- (h) Keeping after-class discussions with a student professional and brief.
- (i) Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries.
- (j) Involving your supervisor if conflict arises with the student.
- (k) Informing the Executive Administrator about situations that have the potential to become more severe.
- (l) Making detailed notes about an incident that could evolve into a more serious situation later.
- (m) Recognizing the responsibility to stop unacceptable behavior of students or coworkers.
- (n) Asking another staff member to be present if you will be alone with any type of special needs student.
- (o) Asking another staff member to be present when you must be alone with a student after regular school hours.
- (p) Giving students praise and recognition without touching them.
- (q) Pats on the back, high fives and handshakes are acceptable.
- (r) Keeping your professional conduct a high priority.
- (s) Asking yourself if your actions are worth your job and career.

**Policy Prohibiting Unlawful Harassment, Discrimination, and Retaliation**

The Charter School is committed to providing a work and educational atmosphere that is free of unlawful harassment, discrimination, and retaliation. The Charter School’s policy prohibits unlawful harassment, discrimination, and retaliation based upon: race (including traits historically associated with race, such as hair texture and hairstyle, including but not limited to braids, locks, and twists); color; gender (including gender identity, gender expression and transgender identity, whether or not the employee is transitioning or has transitioned); sex (including reproductive health decision-making, pregnancy, childbirth, breastfeeding, and related medical conditions); sex stereotype (including an assumption about a person’s appearance or behavior, gender roles, gender expression, or gender identity, or about an individual’s ability or inability to perform certain kinds of work based on a myth, social expectation, or generalization about the individual’s sex); religious creed (including religious dress and grooming practices); marital/registered domestic partner status; age (forty (40) and over); national origin or ancestry (including native language spoken and possession of a driver’s license issued to persons unable to prove their presence in the U.S. is authorized by federal law); physical or mental disability (including HIV and AIDS); medical condition (including cancer and genetic characteristics); taking a leave of absence authorized by law; genetic information; sexual orientation; military and veteran status; or any other consideration made unlawful by federal, state, or local laws.

Employees, volunteers, unpaid interns, individuals in apprenticeship programs, and independent contractors shall not be harassed, or discriminated or retaliated against, based upon the characteristics noted above.

The Charter School does not condone and will not tolerate unlawful harassment, discrimination, or retaliation on the part of any employee (including supervisors and managers) or third party (including independent contractors or other person with which the School does business). Supervisors and managers are to report any complaints of unlawful harassment to the Executive Director or designee.

When the Charter School receives allegations of unlawful harassment, discrimination, or retaliation, the Board (if a



complaint is about the Executive Director) or the Executive Director or designee will conduct a fair, timely and thorough investigation that provides all parties an appropriate process and reaches reasonable conclusions based on the evidence collected. The investigation will be handled in as confidential a manner as possible, although complete confidentiality cannot be guaranteed. Complainants and witnesses shall not be subject to retaliation for making complaints in good faith or participating in an investigation. The Charter School is committed to remediating any instances where investigation findings demonstrate unlawful harassment, discrimination, or retaliation has occurred.

### Prohibited Unlawful Harassment

- Verbal conduct such as epithets, derogatory jokes or comments or slurs;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement, or interfering with work because of sex, race or any other protected basis;
- Retaliation for reporting or threatening to report harassment; or
- Disparate treatment based on any of the protected classes above.

### Prohibited Unlawful Sexual Harassment

The Charter School is committed to providing a workplace free of sexual harassment and considers such harassment to be a major offense, which may result in disciplinary action, up to, and including dismissal, of the offending employee.

Sexual harassment consists of sexual advances, request for sexual favors and other verbal or physical conduct of a sexual nature, regardless of whether or not the conduct is motivated by sexual desire, when: (1) submission to the conduct is either made explicitly or implicitly a term or condition of an individual's employment; (2) an employment decision is based upon an individual's acceptance or rejection of that conduct; and/or (3) that conduct interferes with an individual's work performance or creates an intimidating, hostile or offensive working environment.

It is also unlawful to retaliate in any way against an employee who has articulated a good faith concern about sexual harassment against him or her or against another individual.

All supervisors of staff will receive two (2) hours of sexual harassment prevention training within six (6) months of hire or their assumption of a supervisory position and every two (2) years thereafter. All other employees will receive one (1) hour of sexual harassment prevention training within six (6) months of hire and every two (2) years thereafter. Such training will address all legally required topics, including information about the negative effects that abusive conduct has on both the victim of the conduct and others in the workplace, as well as methods to prevent abusive conduct undertaken with malice a reasonable person would find hostile, offensive, and unrelated to an employer's legitimate business interests. Abusive conduct includes but is not limited to repeated infliction of verbal abuse, such as the use of derogatory remarks, insults, and epithets, verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating, or the gratuitous sabotage or undermining of a person's work performance. Supervisors shall also be trained on how to appropriately respond when the supervisor becomes aware that an employee is the target of unlawful harassment. Other staff will receive sexual harassment prevention training as required by law.

Each employee has the responsibility to maintain a workplace free from any form of sexual harassment. Consequently, should any individual, in particular those with supervisory responsibilities, become aware of any conduct that may constitute sexual harassment or other prohibited behavior, immediate action should be taken to address such conduct. Any employee who believes they have been sexually harassed or has witnessed sexual harassment is encouraged to immediately report such harassment to the Executive Director. See **Appendix A** for the "Harassment/Discrimination/Retaliation Complaint Form." See **Appendix B** for the general "Internal Complaint Form."

Sexual harassment may include, but is not limited to:

- Physical assaults of a sexual nature, such as:
  - Rape, sexual battery, molestation or attempts to commit these assaults and
  - Intentional physical conduct that is sexual in nature, such as touching, pinching, patting, grabbing, brushing against another's body, or poking another's body.

- Unwanted sexual advances, propositions or other sexual comments, such as:
  - Sexually oriented gestures, notices, remarks, jokes, or comments about a person's sexuality or sexual experience.
  - Preferential treatment or promises of preferential treatment to an employee for submitting to sexual conduct, including soliciting or attempting to solicit any employee to engage in sexual activity for compensation or reward or disparate treatment for rejecting sexual conduct.
  - Subjecting or threats of subjecting an employee to unwelcome sexual attention or conduct or intentionally making performance of the employee's job more difficult because of the employee's sex.
- Sexual or discriminatory displays or publications anywhere at the workplace by employees, such as:
  - Displaying pictures, cartoons, posters, calendars, graffiti, objections, promotional materials, reading materials, or other materials that are sexually suggestive, sexually demeaning or pornographic or bringing to work or possessing any such material to read, display or view at work;
  - Reading publicly or otherwise publicizing in the work environment materials that are in any way sexually revealing, sexually suggestive, sexually demeaning or pornographic; and
  - Displaying signs or other materials purporting to segregate an employee by sex in an area of the workplace (other than restrooms or similar rooms).

The illustrations of harassment and sexual harassment above are not to be construed as an all-inclusive list of prohibited acts under this policy. Moreover, please note that while in most situations a personal relationship is a private matter, these relationships are not appropriate in a professional setting, particularly where one of the parties has management or supervisory responsibilities. As such, consensual relationships in the workplace may violate Charter School policy.

## **Consensual Relationships**

Consensual relationships in the workplace are discouraged. Consensual relationships between supervisors and employees and between staff and parents or students are potentially exploitative and must be avoided. They raise serious concerns about the validity of the consent, conflicts of interest, and unfair treatment of others. Moreover, consensual relationships in the workplace can lead to problems with morale, decreased productivity and increased liability. The Charter School has a strong policy against sexual harassment and is concerned that consensual relationships might potentially violate the policy. The School aims to prevent sexual harassment from occurring in the workplace. To help prevent sexual harassment, employees who enter into consensual relationships must each notify administration regarding the relationship, review the sexual harassment policy, and execute a consensual relationship agreement. Moreover, employees must abide by the sexual harassment policy and consensual relationship agreement, behave professionally at work, and not let the relationship affect their work or the workplace.

Employees involved in consensual relationships in the School's workplace are prohibited from evaluating the work performance of others with whom they have a relationship, or from making hiring, salary or similar decisions which may impact some persons.

Violations of this policy may result in disciplinary action up to and including release from at-will employment.

## **Policy Concerning Violence in the Workplace**

The Charter School recognizes that violence in schools is a growing nationwide problem necessitating a firm and considered response. The costs of such violence are great, both in human and financial terms. The safety and security of Charter School employees and students is paramount. The Charter School has adopted this policy regarding workplace violence to help maintain a secure workplace.



The Charter School is committed to providing a safe, violence-free workplace and school and strictly prohibits employees, consultants, students, parents, contractors, visitors, or anyone else on Charter School premises or engaging in a Charter School-related activity from behaving in a violent or threatening manner.

The Charter School seeks to prevent workplace violence before it begins, and reserves the right to deal with employee behavior that suggests a propensity towards violence even prior to any violent behavior occurring. The Charter School believes that prevention of workplace violence begins with recognition and awareness of potential early warning signs, and has established procedures for responding to any situation that presents the possibility of violence.

### Workplace Violence Defined

Workplace violence includes threats of any kind; threatening, physically aggressive, or violent behavior, such as intimidation, or attempts to instill fear in others; other behavior that suggests a propensity toward violence, including belligerent speech, excessive arguing or swearing, sabotage, threats of sabotage of Charter School property; defacing Charter School property or causing physical damage to the facilities; and, with the exception of security personnel, bringing weapons or firearms of any kind on Charter School premises or while conducting Charter School business.

### Complaint Procedure

If any employee observes or becomes aware of any of the above-listed actions or behavior by an employee, consultant, student, parent, contractor, visitor, or anyone else, he or she must immediately notify the Charter School's Executive Administrator, the Executive Director, or the Human Resources contact. Employees should also notify the Executive Administrator, the Executive Director, or the Human Resources contact if any restraining order is in effect, or if a potentially violent non-work-related situation exists that could result in violence in the workplace.

All reports of workplace violence will be taken seriously and will be investigated promptly and thoroughly. In appropriate circumstances, the Charter School will inform the reporting individual of the results of the investigation. To the extent feasible, the Charter School will maintain the confidentiality of the reporting employee. However, the Charter School may need to disclose information in appropriate circumstances (for example, in order to protect individual safety). The Charter School will not tolerate retaliation against any employee who reports workplace violence.

If the Charter School determines that workplace violence has occurred or has been threatened, the Charter School will take appropriate corrective action and may impose discipline on offending employees, up to and including termination.

### Ensuring A Secure Workplace

As part of its Policy Concerning Violence in The Workplace, the Charter School has developed guidelines to help maintain a secure school and workplace. The security of facilities, as well as the welfare of Charter School students and employees, depend upon the alertness and sensitivity of every individual to potential security risks.

- Employees should ensure that all visitors have signed the visitor log and are wearing appropriate visitor badges.
- Employees should report any suspicious persons or activities to security personnel.
- Employees should secure their desk or office at the end of the day.
- When called away from their work area for an extended length of time, employees should not leave valuables and/or personal articles in or around their workstation that may be accessible to others.
- Employees should notify the Executive Administrator or the Director/Coordinator of Operations immediately when keys, security passes, or identification badges are missing.
- Employees should be aware of persons loitering for no apparent reason in parking areas, walkways, entrances and exits, and report them to security personnel if appropriate.

## **Whistleblower Policy**

The Charter School requires its directors, officers, employees, and volunteers to observe high standards of ethics in the conduct of their duties and responsibilities within the School. As representatives of the School, such individuals must practice honesty and integrity in fulfilling all responsibilities and must comply with all applicable laws and regulations. The purpose of this policy is to create an ethical and open work environment, to ensure that the School has a governance and accountability structure that supports its mission, and to encourage and enable directors, officers, employees, and volunteers of the School to raise serious concerns about the occurrence of illegal or unethical actions within the School before turning to outside parties for resolution.

All directors, officers, employees, and volunteers of the School have a responsibility to report any action or suspected action taken within the School that is illegal, unethical or violates any adopted policy of the School, or local rule or regulation. Anyone reporting a violation must act in good faith, without malice to the School or any individual at the School and have reasonable grounds for believing that the information shared in the report indicates that a violation has occurred. A person who makes a report does not have to prove that a violation has occurred. However, any report which the reporter has made maliciously or any report which the reporter has good reason to believe is false will be viewed as a serious disciplinary offense. No one who in good faith reports a violation, or who, in good faith, cooperates in the investigation of a violation shall suffer harassment, retaliation, or adverse employment action. Further, no one who in good faith discloses, who may disclose, or who the School believes disclosed or may disclose, information regarding alleged violations to a person with authority over the employee or another employee who had responsibility for investigating, discovering or correcting the purported violation shall suffer harassment, retaliation, or adverse employment action.

## **Drug and Alcohol Free Workplace Policy**

To further its interest in avoiding accidents, to promote and maintain safe and efficient working conditions for its employees, to promote and maintain a safe environment for its students, to protect the school, school grounds, equipment, and operations, and in compliance with certain requirements, the Charter School has established this policy concerning the use of drugs. As a condition of continued employment with the Charter School, each employee must abide by this policy.

This policy applies whenever the interests of the Charter School may be adversely affected, including any time that an employee is on Charter School premises, conducting or performing activities on behalf of the Charter School (regardless of location), or responsible for the safety of others in connection with, or while performing, Charter School-related business.

Employees who suspect they may have alcohol or drug problems, even in the early stages, are encouraged to voluntarily seek diagnosis and follow through with any treatment as prescribed by qualified professionals. Employees who wish to voluntarily enter and participate in an approved alcohol or drug rehabilitation program are encouraged to contact the Human Resources contact, who will determine whether the Charter School can accommodate the employee by providing unpaid leave for the time necessary to complete participation in the program. Employees should be aware that participation in a rehabilitation program will not necessarily shield them from disciplinary action for a violation of this policy.

### Illegal Drugs and Controlled Substances

An “illegal drug or controlled substance” is any drug or substance that is not legally obtainable, is legally obtainable but has not been legally obtained, or has been legally obtained but is being sold or distributed unlawfully. The unlawful manufacture, distribution, dispensing, transporting, possession, purchasing, sale or use of any illegal drug or controlled substance is prohibited in the workplace. Any employee who unlawfully uses, possesses, purchases, sells, manufactures, distributes, transports, or dispenses any illegal drug or controlled substance will be subject to discipline up to and including termination. “Possesses” means that the employee has the substance on his or her person or otherwise under his or her control. Any employee who is under the influence of any illegal drug or controlled substance will be subject to discipline up to and including termination.

### Legal Drugs

A “legal drug” is any drug, including any prescription drug or over-the-counter drug, that has been legally obtained and that is not unlawfully sold or distributed. Any employee who abuses a legal drug will be subject to discipline up to and including termination. “Abuse of a legal drug” means the use of any legal drug for any purpose other than the purpose for which it was prescribed or manufactured, or in a quantity, frequency, or manner that is contrary to the instructions or recommendations of the prescribing physician or manufacturer. Any employee who purchases, sells, manufactures, distributes, transports, possesses or dispenses any legal prescription drug in a manner inconsistent

with the law will be subject to discipline up to and including termination. Any employee who works while impaired by the use of a legal drug will be subject to discipline up to and including termination whenever such impairment might (1) endanger the safety of the employee, students or some other person; (2) pose a risk of significant damage to Charter School property or equipment; or (3) substantially interfere with the employee's job performance or the efficient operation of the school or Charter School equipment.

The Charter School recognizes that employees may be prescribed legal drugs that, when taken as prescribed or according to the manufacturer's instructions, may result in their impairment. Employees may not work while impaired by the use of legal drugs if the impairment might endanger the employee, students or someone else, pose a risk of significant damage to Charter School property, or substantially interfere with the employee's job performance. If an employee is so impaired by the appropriate use of legal drugs, he or she may not report to work.

Nothing in this policy is intended to prohibit the customary and ordinary purchase, sale, use, possession, or dispensation of over-the-counter drugs, so long as that activity does not violate any law or result in an employee being impaired by the use of such drugs in violation of this policy. Furthermore, nothing in this policy is intended to diminish the Charter School's commitment to employ and reasonably accommodate qualified disabled individuals. The Charter School will reasonably accommodate qualified disabled employees who must take legal drugs because of their disability.

### Alcohol

Any employee who is under the influence of alcohol during work hours will be subject to discipline up to and including termination. Similarly, employees are prohibited from engaging in the unauthorized use, possession, purchase, sale, manufacture, distribution, transportation or dispensation of alcohol during work hours or while attending work-related events. Nothing in this policy prohibits an employee from consuming alcohol at a Charter School-sponsored event or while attending a work-related function where alcohol is served and students are not present, provided that the employee exercises good judgment to avoid becoming inebriated.

### Disciplinary Action

A first violation of this policy will result in immediate termination whenever the prohibited conduct caused injury to the employee, a student, or any other person, or endangered the safety of the employee, students, or any other person.

In circumstances other than those described in the above paragraph, the Charter School will exercise its discretion to determine whether to terminate an employee for a first violation of this policy. In addition to termination, disciplinary action for a violation of this policy can include, but is not limited to, suspension, demotion and/or counseling.

### Criminal Convictions

An employee who is convicted under a criminal drug statute for a violation occurring in the workplace or during any Charter School-related activity or event will be deemed to have violated this policy. Employees must notify the Charter School in writing of any conviction under a criminal drug statute for any violation occurring in the workplace or off-duty within five (5) days after any such conviction. The Charter School will notify any agency it is required to notify by law of any employee who has been convicted under a criminal drug statute.

### Off-the-Job Conduct

This policy is not intended to regulate off-the-job conduct, so long as the employee's off-the-job drug use does not result in the employee being under the influence of or impaired by the use of drugs in violation of this policy, and otherwise does not have a negative impact on the Charter School's reputation, environment or ability to educate its students.

### Confidentiality of Drug Use Disclosures

Disclosures made by employees to the Human Resources contact concerning their use of legal drugs will be treated with due regard to confidentiality and will ordinarily not be revealed to others unless there is a work-related or school-related reason for doing so. Disclosures made by employees to the Human Resources contact concerning their participation in any drug or alcohol rehabilitation program will be treated confidentially to the extent legally permitted.

### Drug-Free Awareness Program

The Charter School has established a Drug-Free Awareness Program. Employees with questions about the Program are encouraged to contact the Human Resources contact.

## **Confidentiality of Information**

During employment, employees may have access to and/or become aware of information of a confidential, proprietary, or private nature ("Confidential Information"). For purposes of this policy, "Confidential Information" includes but is not limited to: information and data relating to Charter School students; non-public Charter School budget or financial information; and payroll and personnel information relating to current or former employees.

At all times during and after employment with the Charter School, employees are required to hold all Confidential Information in trust and keep Confidential Information confidential.

During employment with the Charter School, employees may use Confidential Information or disclose Confidential Information to a third party only: (1) as reasonably required in the course of employment with the Charter School; (2) as permitted with the prior written consent of the Charter School; or (3) as may otherwise be required by law.

If the employee is in doubt about whether information should be disclosed or used, the employee should discuss the situation with the Executive Administrator before disclosing or using the information.

Employees' obligations under this Confidentiality of Information policy remain in effect even after their employment relationship with the Charter School ends. After separation of employment, an employee may not use or disclose Confidential Information to any third party unless required to do so by law. Upon separation of employment, employees must immediately return to the Charter School any and all documents, computer or electronic files, print-outs, copies, or other information containing Confidential Information in their possession, custody or control. If the employee is requested to disclose Confidential Information to a third party in a subpoena or similar type of request, the employee shall give written notice to the Charter School's Director of such request as soon as is reasonably possible and at least five business days prior to Employee making any such disclosures.

Additionally, under this Confidentiality of Information policy, employees must comply with all confidentiality-related obligations imposed by the Family Educational Rights and Privacy Act (FERPA).

## **Conflict of Interest**

All employees must avoid situations involving actual or potential conflict of interest. An employee involved in any relationships or situations which may constitute a conflict of interest should immediately and fully disclose the relevant circumstances to the Executive Administrator, or the Board of Directors, for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, the School may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts shall constitute grounds for disciplinary action.

## **Smoke-Free Campus**

The Charter School facilities, including but not limited to parking lots, athletic fields, and any other spaces accessible to employees, students, and/or parents, are all smoke-free.

## THE WORKPLACE

### Employee Classifications

Each Charter School employee is either “exempt” or “nonexempt.” An employee’s duties, responsibilities, and salary determine whether his or her position is exempt or nonexempt. Employees classified as nonexempt are eligible for overtime pay according to applicable state and federal guidelines. Employees in exempt positions are not eligible for overtime pay.

In addition, employees will fall within one (1) of the following categories:

- **Regular Full-Time Employees:** Regular full-time employees are regularly scheduled to work forty (40) or more hours per week during weeks they are scheduled to work. Generally, they are eligible for the employment benefit and leave programs provided by the Charter School, subject to the terms, conditions and limitations of each benefit program, as described later in this handbook.
- **Regular Part-Time Employees:** Regular part-time employees are regularly scheduled to work fewer than forty (40) hours per week during weeks they are scheduled to work. Employees who are not scheduled to work but who work on an as-needed basis, and who regularly work less than forty (40) hours per week, are also considered part-time employees. As described later in this handbook, part-time employees receive all legally-mandated benefits and leaves, but they generally are ineligible for all of the Charter School’s other employment benefit and leave programs. Regular part-time employees may be required to work forty (40) or more hours during a particular week as needed by the Charter School’s work requirements, but such short-term increases in the hours worked will not change the individual’s status as a regular part-time employee except as otherwise required by applicable law. A change from part-time to full-time status will be effective only if the employee has been advised in writing of the status change by the Human Resources contact.
- **Temporary Employees:** Temporary employees are those employed for short-term assignments or in connection with a specific project or event. Temporary employees are not eligible for employee benefits, except those mandated by applicable law.

Each Charter School employee also falls into one (1) of the following four (4) categories: “Teacher,” “Administrative Employee,” “Administrative Support Staff,” or “Staff Employee.” Some of the policies and benefits described herein depend on whether the employee is a Teacher, Administrative Employee, Administrative Support Staff or Staff Employee. Those categories are defined as follows:

- Teachers are those employees hired by the Charter School for the primary purpose of instructing Charter School students. This category does not include substitute teachers.
- Administrative Employees are those employees working in the positions of Executive Director, Executive Administrator, Director of, and Coordinator of.
- Administrative Support Staff are those employees working in the positions of Program Coordinator, Parent Coordinator, and SCC Managers.
- Staff Employees are those employees who work in any of the following positions: Office staff, Custodial staff, Tutor, and Behavior Intervention Implementation Assistant, and supervision aides. This category also includes any other employees of the Charter School who do not fall into the categories listed above.

### Work Schedule

The Charter School’s hours of school operation during the academic year are generally 7:30 a.m. to 6:00 p.m., Monday through Friday. The regular workday schedule for nonexempt full-time employees is eight (8) hours; the regular workweek schedule is forty (40) hours. Exempt employees are also generally expected to be present during business hours and to commit whatever additional time is necessary to satisfactorily complete all job requirements with a minimum onsite obligation of 8 hours.

### Scheduling

All employees will be assigned a work schedule suitable for their position and will be expected to begin and end work according to their schedules. Please note that schedules may vary depending on (1) whether school is currently in session; and (2) whether employees work on an academic year basis or on a twelve-month basis; and (3) whether there is a special event requiring a modified schedule.

All work schedules are subject to change. If an employee needs to temporarily modify their schedule, they must obtain approval from their immediate supervisor. Permanent or extended work schedule modifications must be approved by the Executive Administrator, or Executive Director.

## **Meal and Rest Periods**

The Charter School provides employees with meal and rest breaks according to applicable laws. All employees are encouraged to take appropriate meal and rest breaks.

Nonexempt employees working at least five (5) hours are provided with a thirty (30) minute meal period, to be taken approximately in the middle of the workday, but by no later than the end of the 5<sup>th</sup> hour of work. An employee may waive this meal period if the day's work will be completed in no more than six (6) hours, provided the employee and the Charter School mutually consent to the waiver in writing.

Nonexempt employees are also provided with a ten (10) minute rest period for every four (4) hours worked which should be scheduled towards the middle of the four (4) hour work period as practicable. Employees are prohibited from combining meal and rest period time.

An employee's supervisor must be aware of and approve scheduled meal and rest periods. Employees must immediately inform their supervisor if they are prevented from taking their meal and/or rest periods. Employees are expected to observe assigned working hours and the time allowed for meal and rest periods.

## **Lactation Accommodation**

Charter School accommodates lactating employees by providing a reasonable amount of break time to any employee who desires to express breast milk for an infant child. The break time shall, if possible, run concurrently with any break time already provided to the employee. Any break time provided to express breast milk that does not run concurrently with break time already provided to the nonexempt employee shall be unpaid.

Charter School will make reasonable efforts to provide employees who need a lactation accommodation with the use of a room or other private location that is located close to the employee's work area. Such room/location shall not be a bathroom, and shall have electricity. Employees shall also be given access to a sink with running water and a refrigerator. Employees with private offices will be required to use their offices to express breast milk. Employees who desire lactation accommodations should contact their supervisor to request accommodations.

## **Attendance and Tardiness**

All employees, whether exempt or nonexempt, are expected to arrive at work consistently and on time. Absenteeism and tardiness negatively affects the School's ability to implement its educational program and disrupts consistency in students' learning.

If it is necessary to be absent or late, employees are expected to telephone the Executive Administrator as soon as possible (preferably by 2:30 p.m. of the previous day) but no later than one-half (1/2) hour before the start of the workday. If an employee is absent from work longer than one (1) day, he or she is expected to keep the Executive Administrator sufficiently informed of the situation.

As noted in the section of this Handbook concerning prohibited conduct, excessive or unexcused absences or tardiness may result in disciplinary action up to and including release from at-will employment with the School. Absence for more than three (3) consecutive days without notifying the Executive Administrator will be considered a voluntary resignation from employment.

## **Timecards/Records**

By law, Charter School is obligated to keep accurate records of the time worked by all employees. Such employees shall be required to utilize the School's timecard system (YPICS Paycom System).



Nonexempt employees must accurately clock in and out of their shifts utilizing Paycom as this is the only way the payroll department knows how many hours each employee has worked and how much each employee is owed. The timecard indicates when the employee arrived and when the employee departed. All nonexempt employees must clock in and out of YPICS for arrival and departure, along with lunch and for absences like doctor or dentist appointments. All employees are required to keep the office advised of their departures from and returns to the school premises during the workday.

All employees are solely responsible for ensuring accurate information on their timecards and remembering to record time worked. If an employee forgets to mark their timecard or makes an error on the timecard, the employee must leave a comment on their timesheet to make the correction and such correction will be reviewed by the Executive Administrator/Supervisor.

Nonexempt employees are prohibited from performing off-the-clock work, including but not limited to checking emails before/after work hours, performing work in the morning before logging in, and running School errands after logging out.

No one may record hours worked on another's worksheet. Any employee who violates any aspect of this policy may be subject to disciplinary action, up to and including release from at-will employment with the School.

## **Use of Charter School Technology and Other School Property**

### School Property

All desks, workstations, computers, and equipment are Charter School property. Depending on the employee's job duties, the Charter School may issue an employee property to assist in his or her work, and the employee is fully responsible for any Charter School property issued. It must be stressed that employees do not have a reasonable expectation of privacy with respect to use of Charter School technology and other School property discussed herein.

### Use of Technology Resources

The Charter School utilizes various forms of technology resources in conducting its business. "Technology resources" refers to all electronic devices and systems, software, and means of electronic communication including, but not limited to, the following: communication applications (SLACK/ Google Voice); personal computers and workstations; laptop computers; mini and mainframe computers; computer hardware such as disk drives; peripheral equipment such as printers, modems, scanners, fax machines, and copiers; computer software applications and associated files and data, including software that grants access to external services, such as the Internet; telephones; voicemail systems; electronic-mail systems; portable computer devices; cellular telephones; personal digital assistant devices (sometimes referred to as PDA's); personal organizers and other electronic wireless communication devices; digital cameras; and video recorders. The Charter School's technology resources are Charter School's property, and there are special rules that apply to the technology resources as set forth below.

Depending on the employee's job duties, the Charter School may provide an employee with access to some or all of its technology resources or issue an employee a technology resource to use for business purposes. Only employees whose job performance will benefit from the use of the Charter School's technology resources will be given access to or issued technology resources.

Employees who use the Charter School's technology resources must do so responsibly, and are required to comply with all state and federal laws, the policies of the Charter School, and with normal standards of professional and personal courtesy and conduct. Racist, sexist, harassing or threatening language is strictly prohibited. For example, there is to be no viewing, transmitting, downloading, sharing, use or printing of sexually-explicit images, messages, or cartoons; or any viewing, transmitting, downloading, sharing, use or printing of materials that contain ethnic slurs, racial epithets, derogatory, defamatory, obscene or offensive statements or images; or anything that may be construed as harassment or disparagement of others based on their race, national origin, ancestry, sex, gender identity, pregnancy, sexual orientation, marital status, age, physical or mental disability, genetic information, medical condition, religious beliefs, family care or medical leave status, veteran status or any other characteristic protected by federal, state or local laws.

In addition, employees also are prohibited from using the Charter School's technology resources for gambling. Employees must not use the technology resources to copy, retrieve, forward or send copyrighted materials unless the employee has the author's permission or is accessing a single copy only for the employee's reference.

### Personal Use of School Property and Technology Resources

The Charter School's property and technology resources are to be used by employees for the purpose of Charter School business. This policy does not prohibit limited use of a personal or social nature on the employee's non-work time, providing such use does not violate any of the Charter School's policies or detract from the employee's performance of his or her job duties. The Charter School reserves the right to determine when personal use of technology resources or property is excessive or improper, and may require reimbursement from an employee and/or discipline the employee when the employee has used the resources or property excessively or improperly.

### The Charter School's Right to Access and Inspect School Property and Technology Resources

The Charter School reserves the right to inspect all Charter School property, including but not limited to desks, workstations, cabinets, drawers, and closets, as well as any contents, effects, or articles in Charter School property. Such inspection can occur at any time, with or without advance notice or consent.

In addition, the Charter School specifically reserves the right to access, monitor and inspect the contents of, and data stored in, all of its technology resources at any time for any reason, in its sole discretion. Employees should understand that they have no right of privacy with respect to any messages or information created, maintained, received or stored on Charter School's technology resources, even if those devices require a personal password to use or access or if the information has been deleted. All email, text and voicemail messages sent and received, including personal messages, all Internet sites visited, and all data and information stored on Charter School's technology resources may be accessed, monitored and inspected by the Charter School and are Charter School property, regardless of content. Any employee who chooses to use a Charter School technology resource for personal use does so with the express notice that the Charter School has the right to access, monitor and inspect all information on the device, including but not limited to reviewing any personal voicemails, email messages, text messages, images, video or other personal information stored on the device. The Charter School may conduct this inspection by reviewing the contents of the technology resources or by obtaining and reviewing records maintained by a third-party that supplies services to the Charter School pertaining to the technology resources.

The Charter School reserves the right to advise appropriate legal authorities of any incident where it reasonably believes an employee violated the law.

### Cellular Phone Use and Electronic Wireless Communication Policy

Because of their job responsibilities, some Charter School employees may be assigned cellular phones or electronic wireless communication devices ("ECDs") by the Charter School. Charter School cellular phones and ECDs are Charter School property and are to be used by employees for the purpose of Charter School business. Employees should not use personal devices or email accounts for School-related communications. Such communications should only take place using School-issued devices and via the employee's email account. This policy does not prohibit limited use of the cellular phones or ECDs for personal use during the employee's non-work time, provided such use does not violate any Charter School guidelines and practices or detract from the employee's performance of his or her job duties. Frequent use of Charter School cellular phone or ECDs for personal calls during work time or during non-work time is a violation of this policy. The Charter School reserves the right to determine when personal use of the cellular phone or ECDs is excessive or improper, and may require reimbursement from an employee and/or discipline the employee when the employee has used his or her Charter School cellular phone and/or ECDs excessively or improperly.

As set forth in more detail above, the Charter School has the right to inspect information and data stored on Charter School-issued cellular phone and ECDs, such as incoming and outgoing call history records, text messages, voicemail messages, images and videos. To the extent allowed by law, the Charter School also reserves the right to inspect other information about an employee's use of a Charter School-issued cellular telephone and/or ECDs that is available through the network provider's records. The Charter School reserves the right to rescind cellular phone or ECDs privileges at any time and for any reason.

In addition, the Charter School requires employees to safely use cellular phones while driving during work hours, regardless of whether they are personal or Charter School-issued cellular phones. Employees who use handheld cellular phones must refrain from making or receiving business calls while driving. If an employee needs to make or receive a business phone call using a handheld device while driving, the employee must stop and park his or her vehicle in a proper parking area for the call. Employees who use hands-free cellular phones must keep business conversations brief while driving, and must stop the vehicle and park in a proper parking area if the conversation



becomes involved, traffic is heavy, or road conditions are poor. In an emergency situation only, such as a traffic accident or car trouble, the Charter School recognizes that employees may find it necessary to make a cellular phone call using a hand-held device while driving.

The Charter School also prohibits employees from writing, sending or reading a text-based communication on an ECDs while driving during work hours, regardless of whether the employee is using his own or a Charter School-issued ECDs. For example, employees may not drive during work hours and engage in text messaging, instant messaging, or send or read electronic mail.

Employees who violate this policy are subject to disciplinary action up to and including termination from employment. Please notify the Human Resources contact if you have any questions about cellular phone or ECD use.

### Return of School Property and Technology Resources

An employee who is issued Charter School property or technology resources must return the items when requested by the Charter School or upon voluntary or involuntary termination of employment. All technology resources (i.e. computers, tablets, cords, chargers, cameras, and microphones) must be returned to the Learning and Support Center or the Director of Technology Integration. All other YPICS property must be returned to the site Executive Administrator or designee. If equipment is left at any other location, the employee will be responsible for any resulting damages to, or misuse of, the property or technology resources.

An employee may face disciplinary actions, up to and including termination, if any Charter School property or technology resources issued to him or her is lost, lost due to late return, damaged, misused or not returned to the Charter School. The Charter School reserves its right to recover the value of the property or technology resources from an employee to the full extent authorized by law. Loss of property is to be replaced within the school year. Employees may choose to replace the item at the same value determined by the Charter School, or repay the Charter School through payroll deduction for the replacement cost of the lost or damaged property.

## **Personal Business**

The Charter School's facilities for handling mail and telephone calls are designed to accommodate School business. Employees should have personal mail directed to their home address and limit personal telephone calls to an absolute minimum. Personal calls should not be made outside the immediate dialing area. Do not use School material, time or equipment for personal projects.

## **Social Media**

If an employee decides to post information on the Internet (i.e., personal blog, Facebook, Instagram, Twitter, etc.) that discusses any aspect of his/her workplace activities, the following restrictions apply:

- School equipment, including School computers and electronics systems, may not be used for these purposes;
- Student and employee confidentiality policies must be strictly followed;
- Employees must make clear that the views expressed in their blogs are their own and not those of the School;
- Employees may not use the School's logos, trademarks and/or copyrighted material and are not authorized to speak on the School's behalf;
- Employees are not authorized to publish any confidential or proprietary information maintained by the School;
- Employees are prohibited from making discriminatory, defamatory, libelous or slanderous comments when discussing the School, the employee's supervisors, co-workers and competitors;
- Employees must comply with all School policies, including, but not limited to, rules against unlawful harassment and retaliation.

The Charter School reserves the right to take disciplinary action against any employee whose social media postings violate this or other School policies.

## **Dress Code**

Business casual attire is required of all Charter School employees. All employees must exercise good judgment in their choice of professional appearance for work and work-related activities by always appearing in a way that is appropriate to the situation, and that will:

- invoke a positive professional impression from the community,
- provide appropriate role modeling for students,
- promote a working and learning environment that is free from unnecessary disruption and distractions, and be conducive to high student and staff performance.

During the workday and anytime employees attend work related activities or functions, including activities or functions to which school personnel or students are invited or in which the school personnel or students participate (for example, parent advisory meetings, meetings or conferences with parents, school performances, student competitions, educational or other professional conferences, etc.), employees shall appear in a professionally appropriate manner. Examples of business casual attire include, but are not limited to:

- dress slacks, chinos, and dressy jeans
- dress coordinates
- suits, sports coats, Blazers
- sweater (i.e., cardigan)
- collared shirts or blouse
- non collared shirts paired with/ under a sweater or blazer
- professional dresses
- ties
- casual dress and dress shoes (no athletic shoes except for PE, supervision, and maintenance staff)
- clothing with the officially sanctioned school logo

Staff is not permitted to wear any clothing, paraphernalia, grooming, jewelry, accessories, or body adornments that are disruptive or potentially disruptive to the educational environment as determined by the Executive Director. Examples of clothing, accessories, or body adornments that are not acceptable:

- body piercings (must be modest in size and covered when possible)
- body art (must be covered)
- athletic shoes except for PE, supervision, and maintenance staff
- open toed shoes or sandals including Croc style footwear
  - for safety purposes
  - open heel shoes require a strap
- jeans with tears, holes, or frayed
- graphic or screen t-shirts and non-collared shirts (except for PE teachers and maintenance staff)
- leggings when children are on campus
- headwear inside a building (headwear worn inside a building is permitted if it is of a professional nature, or for health or religious reasons)
- sunglasses inside a building
- Athletic wear including sweatshirts, sweatpants, sweat suits, yoga pants (except for PE teachers, maintenance staff)
- Any clothing that:
  - is an inappropriate length or size.
  - contains language or images that are vulgar, discriminatory, or obscene.
  - promotes illegal or violent conduct, such as the unlawful use of weapons, drugs, alcohol, tobacco, or drug paraphernalia, gang symbols or gang attire.
  - exposes cleavage, private parts, the midriff, or undergarments or that is otherwise sexually provocative.
  - items that are considered sleepwear.

Executive Administrators or designees are delegated the authority and bear the responsibility for ensuring compliance with this policy and are expected to counsel and/or discipline employees who they supervise on professional appearance in conformance with this policy. Executive Administrators or designee will be given the authority to establish stricter appearance requirements than are required by this policy on a temporary or permanent basis as necessitated by the health, safety, discipline, "esprit de corp," educational, public relations, or other needs of that Division/school/work site. In addition, an Executive Administrator or designee may deviate from this policy temporarily to meet the needs of specific division/school/work sites for an appropriately specified purpose. These include:

- spirit events (i.e., College Mondays, Pop-Day, or School Logo Fridays)
- service days
- professional development days (students are not present)
- rainy days
- schoolwide testing days

An Executive Administrators or designee must approve temporary deviations. The Executive Director must approve long term or non-temporary deviations.

Employees who report to work wearing inappropriate attire will be sent home and asked to return to work in proper clothing. Unless otherwise required by law, such employees will not be compensated for the time away from work. Employees also may be subject to discipline if they appear at work inappropriately dressed. If an employee has any questions about the dress code, the employee should contact Human Resources.

## **Telework Policy**

### Purpose

YPICS recognizes approved teleworking as a necessary work arrangement as a result of the ongoing impacts of the coronavirus ("COVID-19") pandemic. This policy details conditions and requirements which apply to all temporary telework assignments due to the impacts of COVID-19.

### Definition

Teleworking allows employees to work at home or in an approved remote location for all or part of their regular workweek. Teleworking is not an entitlement, nor is it a school-wide benefit. This temporary arrangement in no way alters or changes the terms and conditions of employment with the School, and the promulgation of this Policy creates no employee rights in relation to teleworking. Furthermore, the School has the right to refuse to make telework available to an employee and to terminate a telework assignment without cause at any time in its sole and unreviewable discretion.

### General Requirements

Employees shall not telework unless they receive advance written approval from the School. Employees shall make arrangements with their supervisor and co-workers to address on-site job demands that arise, including returning to the work site to perform certain job duties as needed or as directed by their supervisor. Employees shall be responsible for following all School policies and procedures when teleworking. Employees shall also be solely responsible for the performance of their telework duties; assistance from third parties is strictly prohibited.

Nonexempt employees will be required to (1) record all hours worked as assigned by the School and (2) take and document applicable meal/rest periods. Nonexempt employees must also receive written approval from a supervisor prior to working additional hours or overtime. Failure to comply with timekeeping and work hours requirements may result in disciplinary action, up to and including termination from employment.

### Eligibility Considerations

Consideration will be given to employees who work in positions adaptable for telework assignments, particularly those who have demonstrated work habits and performance well-suited to successful teleworking. In the sole discretion of the School and its management, the following eligibility factors will be considered:

- The employee has a position where effective communication can be accommodated electronically;
- The employee's telework assignment will not be detrimental to the productivity or work quality of other employees or the effective operation of the School;
- The employee must be able to perform work from home or an approved remote location without distractions or unnecessary risk to the security of School data, records, networks, or confidentiality generally;
- The employee's equipment and software must meet the School's guidelines/standards, and the employee's needs for Information Technology ("IT") support must be minimal;
- Telework sites must be in California;
- The employee must be effective at working independently for extended periods of time;
- The employee has demonstrated or can demonstrate effective time-management skills by completing tasks efficiently and within any required deadlines;
- The employee must maintain connections with work groups or teams from their remote work location; and
- The employee has no recent or pending corrective or disciplinary actions.

### Supervisor Responsibilities

Supervisors managing employees who have been permitted to telework must effectively:

- Implement the telework policy/guidelines;
- Conduct remote supervision;
- Understand the technology and tools necessary for successful remote supervision; and
- Establish communication protocols with telework employees, including making continued efforts to involve teleworking employees in office/department events, messages, etc. as applicable to preserve teamwork.

Supervisors will assess each employee's progress on a telework assignment periodically to ensure the employee's compliance with telework requirements, and address any work-related issues, including completing evaluations and other performance management as appropriate.

### Communication and Accessibility

Employees and supervisors must determine how communication between the teleworking employee, the worksite, and/or other employees also teleworking will be handled. Employees shall keep their supervisor, and as needed, their co-workers or other School stakeholders (e.g., students and/or parents), informed of their availability so these individuals know how and when to reach the employee during the employee's telework assignment. Employees must be accessible by phone and email at all times to their supervisor, co-workers, School stakeholders, and the School generally during assigned work hours. Employees must notify their supervisors if they leave their telework site during agreed upon hours, aside from applicable meal and rest periods. Employees must post their telework schedule on their calendar, including applicable meal and rest periods. Employees must also remain flexible in their scheduling, and shall be available to attend staff meetings and other meetings as required by their supervisor.

### Safety

The telework space is considered an extension of the School's worksite. Employees will have the same responsibility for safe practices, accident prevention, and accident/injury reporting as in the regular worksite. In case of injury, accident, theft, loss, or tort liability related to telework, the employee must immediately report the event to their supervisor and allow the School or its authorized agent to investigate and/or inspect the telework site as needed.

Employees are responsible for establishing and maintaining a designated, adequate workspace at their telework location. When the telework location is the employee's home, the employee is responsible for ensuring the location is safe (free from hazards and other dangers to the employee or equipment), clean, professional, and free of distractions (e.g., children, pets, electronic devices, etc.).

### Supplies, Equipment, and Furniture

The School will determine, with information supplied by the employee and the supervisor, the appropriate equipment needs (including hardware, software, modems, phone and data lines, facsimile equipment or software,

and photocopiers) for each telework assignment on a case-by-case basis. The School will not provide office furniture for the workspace at home.

All necessary technology equipment will be supplied and maintained by the School, subject to availability. Equipment supplied by the School is to be used for work purposes only. Employees must sign an inventory of all School property and agree to protect the items from damage or theft. Employees shall not be entitled to reimbursement for their use of School property. Employees shall be held liable to the School whenever their wrongful or negligent act or omission causes loss, theft, disappearance, damage to, or destruction of School property. Upon cessation of a telework assignment, all School property must be returned to the School.

### Reimbursement

The School shall reimburse employees for actual and necessary expenses incurred in the employee carrying out School business when such expenses are expressly authorized and preapproved by the School.

**INTERNET REIMBURSEMENT:** The School shall reimburse an employee's costs for internet at \$25.00 per pay period flat-rate, based upon a reasonable percentage of work-related use.

**CELL PHONE REIMBURSEMENT:** The School will not reimburse an employee's cell phone bill. Employees are provided a school provided work phone and or access to Google voice, which allows employees to use the school provided computer to make work related phone calls when necessary.

Employees who believe their expenses exceed the reimbursement the School provides shall be required to submit copies of their internet. Such bills may be redacted as needed to remove any private/confidential information.

### Information Security and Confidentiality

Employees must never provide any third parties access to the School network or share network access passwords, and must comply with all policies and procedures related to information security and network access.

Consistent with the School's expectations of information security for employees working at the office, teleworking employees must ensure that their telework location is secure and communications provided or sensitive work performed from the telework location remain confidential, away from the presence of family members or guests. Any School materials taken home, such as confidential personnel or pupil records, must be kept in a secure space within the telework location and not be made accessible to any third parties, including the employee's family members or guests. Steps which employees may take to increase security of School materials/information include use of locked file cabinets and desks, regular password maintenance, shielding computer monitors, and any other actions appropriate for the position and the telework location.

### Performance Standards

Employees must maintain the same or an improved level of productivity and work quality while teleworking. If productivity and/or work quality begin to decline, the telework assignment will be reevaluated to determine if changes can be made or termination of the telework assignment is warranted. Telework allows a high amount of flexibility for an employee to complete their work in a timely and proper manner, and it is expected that employees will not abuse this opportunity by allowing their productivity or work quality to decline.

### Professional Boundaries

Employees must maintain appropriate levels of professionalism when interacting remotely with students and/or student's family members in full compliance with the School's "Professional Boundaries: Staff/Student Interaction" policy and as summarized below:

- Limit communications with students to issues involving School activities or classes only;
- Ensure professional communications with students by avoiding conversations of an overly personal, inappropriate, sexual, offensive, or indecent nature;
- Respect the privacy rights of students by ensuring communications and/or documents involving confidential pupil information are safeguarded appropriately;
- Maintain the same degree of formality as would be appropriate when working on-site, including in manner of speech, tone, method of communication, and appearance and dress, particularly when the employee may be communicating with students via video chat; and

- Continue to comply with any and all School policies, including enforcing appropriate student behavior and student discipline, child abuse and neglect reporting protocols, and prohibitions on harassment or other inappropriate conduct.

Employees who fail to demonstrate acceptable professional boundaries during a telework assignment may be subject to disciplinary action, up to and including termination from employment.

#### Evaluation and Duration

Evaluation of employee performance during the teleworking assignment may include daily interaction by video, phone and/or email between the employee and the supervisor, and weekly face-to-face and/or video meetings whenever possible to discuss work progress and problems, as needed.

The School may modify or terminate telework assignments at any time, with or without cause or advance notice. Although not required, the School shall endeavor to provide seven (7) days' notice of the modification or termination of any telework assignment whenever possible.

## **Health and Safety Policy**

The Charter School is committed to providing and maintaining a healthy and safe work environment for all employees.

Employees are required to know and comply with the School's General Safety Rules and to follow safe and healthy work practices at all times. Employees are required to report immediately to the Executive Administrator any potential health or safety hazards, and all injuries or accidents.

In compliance with Proposition 65, the School will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

## **COVID-19 Mandatory Vaccination Policy**

#### Purpose

Consistent with YPICS's legal duty to maintain a safe and healthy workplace and to limit the spread of COVID-19, the School shall enforce this COVID-19 Employee Vaccination Policy ("Policy"). The purpose of this Policy is to protect the health, safety, and well-being of all School employees, students, families, and stakeholders to the maximum extent possible, and to facilitate a safe and meaningful return to in-person instruction. At the time of adoption of this Policy, the COVID-19 vaccination is not available for most students (based upon student age). This Policy shall be implemented in a manner that is consistent with current federal, state, and local law, as well as applicable public health guidance, including that from the Centers for Disease Control and Prevention ("CDC") and the California Department of Public Health ("CDPH").

#### Scope

This Policy applies to all School employees who enter campus for any period, or have contact with any employees, students, or other School stakeholders, however brief. All employees are expected to perform part of their work duties on campus when requested. Requests during Distance Learning for these purposes will be made in advance, but all employees need to be prepared to respond to such requests. This Policy applies to COVID-19 vaccines that are currently available to School employees under Food and Drug Administration ("FDA") Emergency Use Authorization, as well as those that may later become available under FDA Emergency Use Authorization. Should any COVID-19 vaccine receive FDA non-emergency use authorization, this Policy will apply to such vaccines as well. Additionally, should any COVID-19 vaccine require two (2) doses for complete inoculation, compliance with this Policy requires both doses.

#### Policy

It is the policy of the School to mandate that all employees receive the COVID-19 vaccine. Employees who refuse to comply with this Policy **and who are not otherwise eligible for an accommodation consistent with applicable legal requirements as further detailed below** will be placed on unpaid/inactive status until they comply. Employees who refuse to vaccinate for COVID-19 and who are not otherwise entitled to an accommodation will be excluded from campus/the workplace pending compliance with this Policy. Continued absences from work as a



result of noncompliance with this Policy may be deemed unexcused, and result in disciplinary action, up to and including termination from employment.

Consistent with applicable law, the School will pay all nonexempt employees for time spent receiving the COVID-19 vaccine, assuming the vaccine cannot be obtained during working hours. The School will also reimburse all employees for the cost of the vaccine (if any), as well as reasonable and necessary mileage (if applicable). All reimbursements require appropriate supporting documentation.

#### Proof of Vaccination

Once School employees receive the COVID-19 vaccine, either when directed to do so or when available, they must provide the School with written proof of COVID-19 vaccination. Written proof of COVID-19 vaccination currently means a vaccination card disbursed to COVID-19 recipients, post inoculation. Failure to provide the School with written proof of COVID-19 vaccination upon request by the School constitutes noncompliance with this Policy. The School further reserves the right to request proof of both the first and second vaccination doses for COVID-19, if applicable.

When providing proof of vaccination, employees must not provide any medical or genetic information to the School. It is an employee's responsibility to ensure their proof of vaccination is free from medical and genetic information.

The School shall strictly maintain confidentiality of all employee COVID-19 vaccination data and related medical information, other than reporting the results to federal, state, and local health departments or agencies, only where required by law. The School will store all medical information about any employee separately from the employee's personnel file in order to limit access to this confidential information. The School will have a separate confidential medical file for each employee where the School stores employee medical information. Medical information includes COVID-19 vaccination data. Please provide HR with an updated copy of your Vaccine Card. Ms. Zubia, YPICS HR Coordinator, will communicate how to upload the requested documentation in PAYCOM.

#### Continued Health and Safety Protocol

Consistent with the School's health and safety protocol, including its COVID-19 Health and Safety Policy and COVID-19 Injury and Illness Prevention Plan Addendum, and until guidance from federal, state, and local public health agencies is revised, all employees must continue to abide by all COVID-19 health and safety protocols, regardless of vaccination status. This includes but is not limited to continued use of facial coverings, frequent hand washing, and social distancing practices.

#### Requests for Accommodations

Employees who are unable to comply with this Policy due to a qualifying disability or sincerely held religious belief, practice, or observance as defined by applicable law may be entitled to an accommodation from the School's COVID-19 vaccination requirement. Once the School is on notice that an employee may be unable to comply with the Policy due to a qualifying disability or sincerely held religious belief, practice, or observance, the School will engage in an interactive process with the employee, and work to identify any possible accommodations. As part of the interactive process, the School reserves the right to request supporting documentation or a medical certification which documents the basis for the requested accommodation. The School may not be required to provide employees with an accommodation should the accommodation result in a direct threat to health and safety at the School or to the employee, or if the accommodation will cause an undue hardship for the School. Employees who believe they may be entitled to a legally valid accommodation consistent with this Policy should contact Human Resources.

Additionally, any YPICS employee under an approved COVID-19 medical or religious exemption may not enter a YPICS campus collocated on a LAUSD property per LAUSD policy.

#### Non-Discrimination

The School will not discriminate, harass, or retaliate against any employee for receiving the COVID-19 vaccine, refusing to receive the COVID-19 vaccine, or for requesting a lawfully- recognized accommodation from the COVID-19 vaccination Policy.

#### Disclaimer

As public health and legal guidance regarding COVID-19 vaccinations evolves, the School reserves the right to revise this Policy. Upon any revision to this Policy, the School will provide immediate notice in writing to all employees.

Should you have any questions regarding this Policy, you may contact Executive Director Yvette King-Berg at [ykingberg@ypics.org](mailto:ykingberg@ypics.org). No Executive Administrator can change this policy.

## **Security Protocols**

The Charter School has developed guidelines to help maintain a secure workplace. Be aware of unknown persons loitering in parking areas, walkways, entrances and exits and service areas. Report any suspicious persons or activities to the Executive Administrator. Employee desk or office should be secured at the end of the day. When an employee is called away from his or her work area for an extended length of time, valuable or personal articles should not be left around a work station that may be accessible. The security of facilities as well as the welfare of employees depends upon the alertness and sensitivity of every individual to potential security risks. Employees should immediately notify the Executive Administrator when keys are missing or if security access codes or passes have been breached.

## **Occupational Safety**

The Charter School is committed to the safety of its employees, vendors, contractors and the public and to providing a clear safety goal for management.

The prevention of accidents is the responsibility of every School supervisor. It is also the duty of all employees to accept and promote the established safety regulations and procedures. Every effort will be made to provide adequate safety training. If an employee is ever in doubt how to perform a job or task safely, assistance should be requested. Unsafe conditions must be reported immediately.

It is the policy of the School that accident prevention shall be considered of primary importance in all phases of operation and administration. The Charter School's management is required to provide safe and healthy working conditions for all employees and to establish and require the use of safe practices at all times.

Failure to comply with or enforce School safety and health rules, practices and procedures could result in disciplinary action up to and including possible termination.

## **Accident/Incident Reporting**

It is the duty of every employee to immediately or as soon as is practical report any accident or injury occurring during work or on School premises so that arrangements can be made for medical or first aid treatment, as well as for investigation and follow-up purposes.

## **Reporting Fires and Emergencies**

It is the duty of every employee to know how to report fires and other emergencies quickly and accurately. Employees should report any such emergency by calling management. In addition, all employees should know the local emergency numbers such as 911.



## **EMPLOYEE WAGES AND HEALTH BENEFITS**

### **Payroll Withholdings**

As required by law, the School shall withhold Federal Income Tax, State Income Tax, Social Security (FICA) and State Disability Insurance from each employee's pay as follows:

1. Federal Income Tax Withholding: The amount varies with the number of exemptions the employee claims and the gross pay amount.
2. State Income Tax Withholding: The same factors which apply to federal withholdings apply to state withholdings.
3. Social Security (FICA): The Federal Insurance Contribution Act requires that a certain percentage of employee earnings be deducted and forwarded to the federal government, together with an equal amount contributed by the School.
4. State Disability Insurance (SDI): This state fund is used to provide benefits to those out of work because of illness or disability.

Employees may also have deductions made to their paychecks when a wage overpayment occurs. The School may require the employee to reimburse an overpayment through a mutually agreeable method, including through cash repayment or a deduction of the employee's payroll check, among other options. An employee who is separated from employment before full repayment of the overpayment amount shall have any remaining amounts withheld from their final check. The School also reserves the right to exercise any and all other legal means to recover any additional amounts owed. The School shall provide employees with advance written notice of the deduction prior to the pay period where it will go into effect.

Every deduction from an employee's paycheck is explained on the check voucher. If an employee does not understand the deductions, he or she should ask the Executive Administrator to explain them.

Employees may change the number of withholding allowances claimed for Federal Income Tax purposes at any time by filling out a new W-4 form via Paycom.

All Federal, State, and Social Security taxes will be automatically deducted from paychecks. Federal Withholding Tax deduction is determined by the employee's W-4 form. The W-4 form should be completed upon hire and it is the employee's responsibility to report any changes in filing status to the Executive Administrator and to fill out a new W-4 form.

At the end of the calendar year, a "withholding statement" (W-2) will be prepared and forwarded to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld and total wages.

### **Overtime Pay**

Whether an employee is exempt from or subject to overtime pay will be determined on a case-by-case basis and will be indicated in the employee's job description. Generally, teachers and administrators are exempt. Nonexempt employees may be required to work beyond the regularly scheduled workday or workweek as necessary. Only actual hours worked in a given workday or workweek can apply in calculating overtime for nonexempt employees. The Charter School will attempt to distribute overtime evenly and accommodate individual schedules. All overtime work must be previously authorized by the Executive Administrator. The Charter School provides compensation for all overtime hours worked by nonexempt employees in accordance with state and federal law as follows:

For employees subject to overtime, all hours worked in excess of eight (8) hours in one workday or forty (40) hours in one workweek shall be treated as overtime. Compensation for hours in excess of forty (40) for the workweek or in excess of eight (8) and not more than twelve (12) for the workday, and for the first eight (8) hours on the seventh consecutive day in one workweek, shall be paid at a rate of one and one-half times the employee's regular rate of pay. Compensation for hours in excess of twelve (12) in one workday and an excess of eight (8) on the seventh consecutive workday of the workweek shall be paid at double the regular rate of pay.

Exempt employees may have to work hours beyond their normal schedules as work demands require. No overtime compensation will be paid to these exempt employees.

## **Makeup Time**

On occasion, employees may need to take time off during working hours to tend to personal obligations. For nonexempt employees, this would normally mean relinquishing any pay for those lost hours or else using vacation time. Pursuant to this policy, however, nonexempt employees who have obtained prior written approval may take time off and then make up the time later in the same workweek, or may work extra hours earlier in the workweek to make up for time that will be taken off later in the workweek.

The makeup work must be performed in the same week that the work time was lost. The Charter School's seven (7) day work week starts Monday at 12:00 a.m. and ends Sunday at 11:59 p.m.

Makeup time worked will not be paid at an overtime rate. Employees may not work more than eleven (11) hours in a day or forty (40) hours in a workweek as a result of making up time that was or would be lost due to a personal obligation. Paycom should clearly reflect when the time was missed and when the time was made up.

A makeup time request must be approved in writing before an employee takes requested time off or works makeup time, whichever is first. Employees must adhere to the following procedure to request makeup time:

- Makeup time requests must be submitted to your Director on the form provided by the Charter School. Makeup time request forms can be obtained from the front office.
- If an employee requests time off that the employee will make up later in the week, the employee must submit a request before the desired time off. If an employee wants to work makeup time first and to take time off later in the week, the employee must submit a request before working the makeup time.
- A separate written request is required for each occasion the employee requests makeup time.
- Requests will be considered for approval based on the Charter School's legitimate business needs at the time the request is submitted.

If an employee takes time off and is unable to work the scheduled makeup time for any reason, the hours missed normally will be unpaid. However, the employee's supervisor may arrange with the employee another day within the same workweek to make up the time if possible, based on scheduling needs. If an employee works makeup time before the employee plans to take off, the employee must take that time off, even if he or she no longer needs the time off for any reason.

An employee's use of makeup time is completely voluntary. The Charter School does not encourage, discourage, or solicit the use of makeup time.

## **Paydays**

Employees are paid on the fifteenth day and the last day of every month. If a payday falls on a holiday or weekend, payday will be on the preceding workday.

## **Wage Attachments and Garnishments**

Under normal circumstances, the School will not assist creditors in the collection of personal debts from its employees. However, creditors may resort to certain legal procedures such as garnishments, levies or judgments that require the School, by law, to withhold part of an employee's earnings in their favor.

Employees are strongly encouraged to avoid such wage attachments and garnishments. If the School is presented a second garnishment request concerning an employee, the Principal will discuss the situation with the employee.

## **Health Care Benefits**

### Eligibility

An employee is eligible for medical coverage if he or she is a regular employee working for the School at least thirty (30) hours per week.

Employees who go from part-time to full-time employment become eligible for full benefits on the first day of the month following the effective date of the change.

Regular part-time employees may be eligible to purchase health care benefits through the Charter School, provided that they otherwise meet the requirements of the health care plan(s). These employees will pay the entire cost of the health care benefits (the Charter School will not pay any portion of the costs of the health care benefits for these employees).

#### When Coverage Starts

Employee coverage will begin on the first day of the next month of employment. An enrollment form must be submitted to the Principal as soon as possible. This form serves as a request for coverage, and authorizes any payroll deductions necessary to pay for coverage.

### **Retirement Benefits**

Eligible employees performing creditable service participate in the State Teachers Retirement System (STRS). Other full-time employees may participate in the Charter School's 403(b) retirement plan.

For more information about the Charter School's retirement benefits, please contact the Human Resources contact. Employees may also contact STRS directly.

### **Life Insurance**

Life insurance is available to eligible regular full-time employees. For more information about life insurance, please contact the Human Resources contact.

### **COBRA Benefits**

When coverage under the School's medical and/or dental plans ends, employees or their dependents can continue coverage for eighteen (18) or thirty-six (36) months, depending upon the reason benefits ended. To continue coverage, an employee must pay the full cost of coverage – the employee contribution and the School's previous contribution plus a possible administrative charge. Charter Life manages all of YPICS COBRA benefits.

Medical coverage for an employee, his/her spouse, and eligible dependent children can continue for up to eighteen (18) months if coverage ends because:

- Employment ends, voluntarily or involuntarily, for any reason other than gross misconduct; or
- Hours of employment are reduced below the amount required to be considered a full-time employee or part-time, making an employee ineligible for the plan.

This eighteen (18) month period may be extended an additional eleven (11) months in cases of disability subject to certain requirements. This eighteen (18) month period may also be extended an additional eighteen (18) months if other events (such as a divorce or death) occur subject to certain requirements.

An employee's spouse and eligible dependents can continue their health coverage for up to thirty-six (36) months if coverage ends because:

- The employee dies while covered by the plan;
- The employee and his/her spouse become divorced or legally separated;
- The employee becomes eligible for Medicare coverage, but his/her spouse has not yet reached age sixty-five (65); or
- The employee's dependent child reaches an age which makes him or her ineligible for coverage under the

plan.

Rights similar to those described above may apply to retirees, spouses and dependents if the employer commences a bankruptcy proceeding and those individuals lose coverage.

The Charter School will notify employees or their dependents if coverage ends due to termination or a reduction in work hours. If an employee becomes eligible for Medicare, divorced or legally separated, dies, or when a dependent child no longer meets the eligibility requirements, the employee or a family member are responsible for notifying the School within thirty (30) days of the event. The Charter School will then notify the employee or his/her dependents of the employee's rights.

Health coverage continuation must be elected within sixty (60) days after receiving notice of the end of coverage, or within sixty (60) days after the event causing the loss, whichever is later.

There are certain circumstances under which coverage will end automatically. This happens if:

- Premiums for continued coverage are not paid within thirty (30) days of the due date;
- The employee (or his/her spouse or child) become covered under another group health plan which does not contain any exclusion or limitation with respect to any pre-existing condition the employee (or the employee's spouse or child, as applicable) may have;
- The Charter School stops providing group health benefits;
- The employee (or the employee's spouse or child) become entitled to Medicare; or
- The employee extended coverage for up to twenty-nine (29)-months due to disability and there has been a final determination that the employee is no longer disabled.

## **PERSONNEL EVALUATION AND RECORD KEEPING**

### **Performance Evaluations**

The Charter School performance evaluation process is intended to make an employee aware of his or her progress, areas in which improvement is needed, and objectives or goals for future work performance. The performance evaluation process provides both the employee and the employee's supervisor with the opportunity to discuss the employee's job, tasks, identify and correct weaknesses in performance, encourage and recognize strengths, and discuss methods for improving the employee's performance.

Favorable performance evaluations do not guarantee increase in salary, promotions, or continued employment.

Administrative Staff, Administrative Support Staff, and Staff Employees will receive performance evaluations at least once per year. Teachers are observed and evaluated formally and informally throughout the academic year.

### **Personnel Files and Record Keeping Protocols**

At the time of employment, a personnel file is established for each employee. It is each employee's responsibility to keep the Executive Administrator advised of changes that should be reflected in their personnel file. Such changes include: change in address, telephone number, marital status, number of dependents and person(s) to notify in case of emergency. Prompt notification of these changes is essential and will enable the School to contact an employee should the change affect their other records.

Employees have the right to inspect documents in their personnel file, as provided by law, in the presence of a School representative, at a mutually convenient time. Employees also have the right to obtain a copy of their personnel file as provided by law. Employees may add comments to any disputed item in the file. The Charter School will restrict disclosure of personnel files to authorized individuals within the School. A request for information contained in the personnel file must be directed to the Executive Administrator. Only the Executive Administrator or designee is authorized to release information about current or former employees. Disclosure of information to outside sources will be limited. However, the School will cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations or as otherwise legally required.

Credible complaints of substantiated investigations into or discipline for egregious misconduct will not be expunged from an employee's personnel file unless the complaint is heard by an arbitrator, administrative law judge, or the Board and the complaint is deemed to be false, not credible, unsubstantiated or a determination was made that discipline was not warranted.

## HOLIDAYS, VACATIONS AND LEAVES

### Holidays

Regular full-time employees who work twelve (12) months will receive time off with pay at their normal base rate for each of the twenty (22) Charter School-observed holidays listed below provided that they are employed by the Charter School at the time of the holiday. If the holiday falls on a Saturday, the Charter School will designate the Friday prior as the paid day off. If the holiday falls on a Sunday, then the Charter School will designate the Monday adjacent to the weekend as a paid day off.

- New Year's Day
- Martin Luther King, Jr.'s Birthday
- Presidents' Day
- Cesar Chavez day
- Easter Monday (at the Charter School's designation)
- Juneteenth
- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve Day
- Christmas Day
- New Year's Eve day
- YPICS's Winter Holiday – shutdown week, 3 days (at the Charter School's designation)
- YPICS's Summer Holiday – shutdown week, 4 days (at the Charter School's designation)

Due to the nature of their job positions, Administrative Employees and Staff Employees do not receive any holidays (other than those days specifically listed above) during Winter Break, Spring Break or Summer Break, but they may choose to request vacation time during those breaks, subject to the approval of the employee's supervisor.

Employees on an unpaid leave of absence will not receive holiday pay. Exempt employees may be required to work during Charter School holidays, as dictated by the Charter School's business needs, but they will not receive any additional compensation for that time. Nonexempt employees should not perform any work during Charter School holidays unless specifically requested by their Director or Executive Director, in which case the nonexempt employee will receive his or her regular rate of pay for the hours worked in addition to the holiday pay.

### Vacation

#### Eligibility and Accrual

##### *12 Month Employees*

Regular full-time employees who are employed on a twelve-month basis may accrue and take paid vacation time. Eligible employees accrue thirteen (13) days of paid vacation per year. Vacation is accrued on a monthly basis (i.e., an employee accrues 1.09 vacation days per month).

#### All Other Employees

No other employees are eligible to earn vacation benefits, including teachers, regular part-time employees and temporary employees.

Vacation days do not accrue during any unpaid leave of absence.

#### Vacation Cap

Eligible employees may only accrue a maximum of 1 1/2 times their annual vacation accrual amount. Regular full-time employees who are employed on a twelve-month basis may not accrue more than twenty (20) days of unused vacation time.

If the employee reaches the vacation cap, the employee shall not accrue additional vacation time unless and until he or she uses vacation time such as to reduce the amount of accrued unused vacation time below the maximum accrual cap. At this point, the employee will resume earning vacation time, prospectively, until he or she again reaches the vacation cap.

### Compensation for Vacation

Vacation can be taken in half-day or full-day increments. Employees will receive pay at their normal base rate for vacation days taken. Eligible nonexempt employees will be paid for vacation based on an eight (8) hour workday. Eligible employees who have accrued vacation days may not receive pay in lieu of vacation except upon termination, at which point any accrued but unused vacation time will be paid.

Sixteen (16) hours of vacation can be used in one (1) hour increments for reasons such as accidents involving the employee, the employee's immediate family, or property; and for other reasons which may result from an uncontrollable event, expected or not, and which must be attended to during duty hours. If an employee needs to use fifteen (15) minutes or more, one (1) hour of vacation time will be utilized.

### Vacation Approval and Scheduling

Requests for vacation time must be approved in advance. In order to request vacation time, employees must submit a time off request in Paycom and notify their supervisor of their submitted request at least two weeks prior to the requested vacation time, absent extraordinary circumstances that the Charter School determines, in its sole discretion, warrant less notice.

Requests for vacation must be approved in advance by your Supervisor, Executive Administrator, or the Executive Director.. The Charter School's Executive Administrator and the Executive Director retain ultimate discretion to approve or deny a request for vacation. Depending on an employee's position and due to the special nature of running a school, the Charter School's Executive Administrator and/or the Executive Director may determine that an employee is not allowed to take vacation during certain periods of the school year. In an emergency, the Charter School retains the right to require an employee to cancel a previously-approved vacation when necessary to meet the Charter School's business needs. **The Charter School strongly discourages employees from requesting vacation time the day before or after a long weekend or break during the academic school year.** *The Charter School provides 22 paid holidays to ensure ample time for employees to refresh and recharge. The organization can not afford for individuals to attempt to make mini-3 and four-day vacations out of holiday weekends. When this happens it negatively impacts instruction and operations. It takes the entire staff to safely operate schools.*

An employee may only use accrued vacation time, and the Charter School generally will not advance or allow employees to borrow vacation time that will be accrued in the future. In limited circumstances, the Charter School may make exceptions to this policy in its sole discretion on a case-by-case basis.

In the event that two (2) or more employees have requested vacation time covering the same period and may not be absent simultaneously, preference shall ordinarily be given to the employee with the greater length of service.

In accordance with applicable law, the Charter School requires employees eligible to accrue and take paid vacation to take up to two (2) weeks of earned by unused vacation leave prior to the employee's receipt of Paid Family Leave benefits.

## **Unpaid Leave of Absence**

The Charter School recognizes that special situations may arise where an employee must leave his or her job temporarily. At its discretion, the School may grant employees leaves of absence. Any unpaid leave of absence must be approved in advance by the School.

The granting of a leave of absence always presumes the employee will return to active work by a designated date or within a specific period.

During a Family and Medical Leave Act, California Family Rights Act leave and /or Pregnancy Disability Leave, the employee's medical and dental benefits will remain in force provided the employee pays the appropriate premiums.



Otherwise, benefits are terminated the month any other type of leave begins. If an employee fails to return from a leave and is subsequently terminated, the employee is entitled to all earned but unused vacation pay, provided that the vacation pay was earned prior to the commencement of leave. No vacation time is accrued during any type of unpaid leave of absence.

## **Sick Leave**

### Eligibility and Accrual

Paid sick leave is available to all Charter School employees who work at least two (2) hours per week for at least thirty (30) days within the span of a single calendar year from the commencement of employment. All eligible teachers shall be credited with eighty (80) hours of sick leave on August 1. All eligible full-time administrators working on a twelve (12) month basis shall be credited with one hundred and twelve (112) hours of sick leave on July 1. All eligible full-time Administrative Staff(excluding Administrators) or Administrative Support Staff (other than Administrator)classified working on a twelve (12) month basis shall be credited with ninety-six (96) hours of sick leave on July 1. All eligible full-time Staff Employees working on a twelve (12) month basis shall be credited with eighty (80) hours. For all other employees, they shall accrue one (1) hour of sick leave for every thirty (30) hours worked.

For those eligible employees noted above, accrued sick leave may carry over from year to year up to a cap of seventy-two (72) hours. The Charter School does not pay employees in lieu of unused sick leave.

### Use

To help prevent loss of earnings that may be caused by accident or illness, or by other emergencies, the School offers paid sick leave to its employees. Sick leave may be taken to receive preventive care (including annual physicals or flu shots) or to diagnose, treat, or care for an existing health condition. Employees may also use sick leave to assist a family member (i.e., children, parents, spouses/domestic partners, grandparents, grandchildren, or sibling, or a designated person (i.e., one who is related to the employee by blood or whose association with the employee is the equivalent of a family relationship) who must receive preventative care or a diagnosis, treatment, or care for an existing health condition. Employees are limited to one (1) designated person per twelve (12) month period. Employees may also take paid sick leave to receive medical care or other assistance to address instances of domestic violence, sexual assault, or stalking.

Employees cannot use paid sick leave until the ninetieth (90<sup>th</sup>) calendar day following the employee's start date. Sick leave must be taken by eligible employees in increments of one (1) hour. Accrued sick leave does not carry over from year to year and the School does not pay employees in lieu of unused sick leave.

If an employee is absent longer than three (3) days due to illness, medical evidence of their illness and/or medical certification of their fitness to return to work satisfactory to the School may be required. The School will not tolerate abuse or misuse of the sick leave privilege. If the School suspects abuse of sick leave, the School may require a medical certification from an employee verifying the employee's absence.

Once an employee has exhausted sick leave, the employee may continue on an unpaid medical leave depending upon the facts and circumstances of the employee's basis for leave beyond accrued sick leave.

### Requesting Sick Leave

Eligible employees should call their direct supervisor. Directors need to call the Executive Director or the Human Resources contact as soon as they are aware that they are unable to report to work. If an Administrative Employee is absent from school due to illness, he or she must notify the school by 2:30 p.m. whether he or she will be absent the next school day. If the employee believes he or she can report to work the next day but subsequently becomes more ill, he or she should notify their director supervisor as soon as possible of the changed circumstances. If medical circumstances allow, employees should add in a time-off request in Paycom before taking sick leave.

Requests for sick leave pertaining to preventive care, to diagnose, treat, or care for an existing health condition, to assist a family member who must receive preventative care or a diagnosis, treatment, or care for an existing health condition must be approved in advance. In order to request sick leave, employees must submit a time off request in Paycom and notify their supervisor of their submitted request at least two (2) weeks prior to the requested sick leave, absent extraordinary circumstances that the Charter School determines, in its sole discretion, warrant less notice.



### Coordination of Sick Leave Benefits With Other Benefits

The Charter School will pay sick leave benefits (to the extent they have been accrued) to an eligible employee during the normal waiting period, if applicable, before the employee is paid workers' compensation benefits pursuant to the applicable law governing industrial injury or illness. Similarly, the Charter School will pay sick leave benefits during the normal waiting period, if applicable, before the eligible employee is paid benefits from state disability or other disability plan.

### Personal Necessity Leave

Teachers may use up to twenty-four (24) hours of their sick leave for personal necessity leave per year. Uses of personal necessity leave may include, but are not limited to, death or serious illness of a member of the teacher's immediate family (this is in addition to Bereavement Leave), an accident involving the teacher's person or property or the person or property of an immediate family member, adoption of a child, the birth of child making it necessary for a teacher who is the parent of the child to be absent from their position during work hours, personal legal matters, religious observances, and business matters that cannot be conducted outside of the workday. Teachers must request personal necessity leave at least one (1) week in advance unless an emergency situation occurs. Personal necessity leave is not vacation, does not accrue, cannot be carried over into the following year, and is not eligible to be paid out upon separation from employment.

## **Family Care and Medical Leave**

This policy explains how the School complies with the federal Family and Medical Leave Act ("FMLA") and the California Family Rights Act ("CFRA"), both of which require the School to permit each eligible employee to take up to twelve (12) workweeks (or twenty-six (26) workweeks where indicated) of FMLA/CFRA leave in any twelve (12) month period for the purposes enumerated below.

### Employee Eligibility Criteria

To be eligible for FMLA/CFRA leave, the employee must have been employed by the School for a total of at least twelve (12) months, worked at least 1,250 hours during the twelve (12) month period immediately preceding commencement of the leave, and work at a location where the School has at least fifty (50) employees within seventy-five (75) miles, (except for purposes of CFRA where the School must only have at least five (5) employees).

### Events That May Entitle an Employee to FMLA/CFRA Leave

The twelve (12) week (or twenty-six (26) workweeks where indicated) FMLA/CFRA allowance includes any time taken (with or without pay) for any of the following reasons:

1. To care for the employee's newborn child or a child placed with the employee for adoption or foster care. Leaves for this purpose must conclude twelve (12) months after the birth, adoption, or placement. If both parents are employed by the School, they each will be entitled to a separate twelve (12) weeks of leave for this purpose, which cannot be loaned or otherwise assigned from one employee to the other.
2. Because of the employee's own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by the School's separate pregnancy disability policy).
  - a. A "serious health condition" is an illness, injury (including, but not limited to, on-the-job injuries), impairment, or physical or mental condition of the employee or a child, parent, or spouse of the employee that involves either inpatient care or continuing treatment, including, but not limited to, treatment for substance abuse.
  - b. "Inpatient care" means a stay in a hospital, hospice, or residential health care facility, any subsequent treatment in connection with such inpatient care, or any period of incapacity. A person is considered an "inpatient" when a health care facility formally admits him/her to the facility with the expectation that he/she will remain at least overnight and occupy

- a bed, even if it later develops that such person can be discharged or transferred to another facility and does not actually remain overnight.
- c. “Incapacity” means the inability to work, attend school, or perform other regular daily activities due to a serious health condition, its treatment, or the recovery that it requires.
  - d. “Continuing treatment” means ongoing medical treatment or supervision by a health care provider.
3. To care for a spouse, domestic partner, child, or parent with a serious health condition. A qualifying family member may also include a parent-in-law, grandparent, grandchild, sibling, or designated person for CFRA purposes. “Designated person” refers to any individual related by blood or whose association with the employee is the equivalent to a family relationship.
  4. When an employee is providing care to a spouse, son, daughter, parent, or next of kin who is a covered Armed Forces service member with a serious injury or illness, the employee may take a maximum of twenty-six (26) weeks of additional FMLA leave in a single twelve (12) -month period to provide said care. CFRA does not provide leave specific to caring for a service member.
  5. For any “qualifying exigency” because the employee is the spouse, son, daughter, or parent of an individual on active military duty, or an individual notified of an impending call or order to active duty, in the Armed Forces. For CFRA purposes, this may also include a domestic partner.

#### Amount of FMLA/CFRA Leave Which May Be Taken

1. FMLA/CFRA leave can be taken in one (1) or more periods, but may not exceed twelve (12) workweeks total for any purpose in any twelve (12) month period, as described below, for any one, or combination of the above-described situations. “Twelve workweeks” means the equivalent of twelve (12) of the employee’s normally scheduled workweeks. For a full-time employee who works five (5) eight-hour days per week, “twelve workweeks” means sixty (60) working and/or paid eight (8) hour days.
2. In addition to the twelve (12) workweeks of FMLA/CFRA leave that may be taken, an employee who is the spouse, son, daughter, parent, or next of kin of a covered Armed Forces service member may also be entitled to a total of twenty-six (26) workweeks of FMLA leave during a twelve (12) month period to care for the servicemember.
3. The “twelve month period” in which twelve (12) weeks of FMLA and CFRA leave may be taken is the twelve (12) month period immediately preceding the commencement of any FMLA/CFRA leave.
4. If a holiday falls within a week taken as FMLA/CFRA leave, the week is nevertheless counted as a week of FMLA/CFRA leave. If, however, the School’s business activity has temporarily ceased for some reason and employees are generally not expected to report for work for one or more weeks, such as the Winter Break, Spring Break, or Summer Vacation, the days the School’s activities have ceased do not count against the employee’s FMLA or CFRA leave entitlement. Similarly, if an employee uses FMLA/CFRA leave in increments of less than one (1) week, the fact that a holiday may occur within a week in which an employee partially takes leave does not count against the employee’s leave entitlement unless the employee was otherwise scheduled and expected to work during the holiday.

#### Pay during FMLA/CFRA Leave

1. An employee on FMLA/CFRA leave because of his/her own serious health condition must use all accrued paid sick leave at the beginning of any otherwise unpaid FMLA/CFRA leave period. If an employee is receiving a partial wage replacement benefit during the FMLA/CFRA leave, the School and the employee may agree to have School-provided paid leave, such as vacation or sick time, supplement the partial wage replacement benefit unless otherwise prohibited by law.

2. An employee on FMLA/CFRA leave for baby-bonding or to care for a qualifying family member with a serious health condition may use any or all accrued sick leave at the beginning of any otherwise unpaid FMLA/CFRA leave.
3. If an employee has exhausted his/her sick leave, leave taken under FMLA/CFRA shall be unpaid leave.
4. The receipt of sick leave pay or State Disability Insurance benefits will not extend the length of the FMLA or CFRA leave. Sick pay accrues during any period of unpaid FMLA or CFRA leave only until the end of the month in which unpaid leave began.

### Health Benefits

The provisions of the School's various employee benefit plans govern continuing eligibility during FMLA/CFRA leave, and these provisions may change from time to time. The health benefits of employees on FMLA/CFRA leave will be paid by the School during the leave at the same level and under the same conditions as coverage would have been provided if the employee had been continuously employed during the leave period. When a request for FMLA/CFRA leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

If an employee is required to pay premiums for any part of his/her group health coverage, the School will provide the employee with advance written notice of the terms and conditions under which premium payments must be made.

The Charter School may recover the health benefit costs paid on behalf of an employee during his/her FMLA/CFRA leave if:

1. The employee fails to return from leave after the period of leave to which the employee is entitled has expired. An employee is deemed to have "failed to return from leave" if he/she works less than thirty (30) days after returning from FMLA/CFRA leave; and
2. The employee's failure to return from leave is for a reason other than the continuation, recurrence, or onset of a serious health condition that entitles the employee to FMLA/CFRA leave, or other circumstances beyond the control of the employee.

### Seniority

An employee on FMLA/CFRA leave remains an employee and the leave will not constitute a break in service. An employee who returns from FMLA/CFRA leave will return with the same seniority he/she had when the leave commenced.

### Medical Certifications

1. An employee requesting FMLA/CFRA leave because of his/her own or a relative's serious health condition must provide medical certification from the appropriate health care provider on a form supplied by the School. Absent extenuating circumstances, failure to provide the required certification in a timely manner (within fifteen (15) days of the School's request for certification) may result in denial of the leave request until such certification is provided.
2. The School will notify the employee in writing if the certification is incomplete or insufficient, and will advise the employee what additional information is necessary in order to make the certification complete and sufficient. The School may contact the employee's health care provider to authenticate a certification as needed.
3. If the School has reason to doubt the medical certification supporting a leave because of the employee's own serious health condition, the School may request a second opinion by a health care provider of its choice (paid for by the School). If the second opinion differs from the first one, the School will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.

4. Recertifications are required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertifications can result in termination of the leave.

#### Procedures for Requesting and Scheduling FMLA/CFRA Leave

1. An employee should request FMLA/CFRA leave by completing a Request for Leave form and submitting it to the Executive Administrator. An employee asking for a Request for Leave form will be given a copy of the School's then-current FMLA/CFRA leave policy.
2. Employees should provide not less than thirty (30) days' notice for foreseeable childbirth, placement, or any planned medical treatment for the employee or his/her qualifying family member. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA/CFRA leave was an emergency or was otherwise unforeseeable.
3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.
4. If FMLA/CFRA leave is taken because of the employee's own serious health condition or the serious health condition of the employee's qualifying family member, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition.
5. If FMLA/CFRA leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two (2) weeks, except that the School will grant a request for FMLA/CFRA leave for this purpose of at least one day but less than two (2) weeks' duration on any two (2) occasions.
6. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.
7. The School will respond to an FMLA/CFRA leave request no later than five (5) business days of receiving the request. If an FMLA/CFRA leave request is granted, the School will notify the employee in writing that the leave will be counted against the employee's FMLA/CFRA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

#### Return to Work

1. Upon timely return at the expiration of the FMLA/CFRA leave period, an employee is entitled to the same or a comparable position with the same or similar duties and virtually identical pay, benefits, and other terms and conditions of employment unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA/CFRA leave.
2. When a request for FMLA/CFRA leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the termination of the leave (with the limitations explained above).
3. Before an employee will be permitted to return from FMLA/CFRA leave taken because of his/her own serious health condition, the employee must obtain a certification from his/her health care provider that he/she is able to resume work.
4. If an employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

#### Employment during Leave

No employee, including employees on FMLA/CFRA leave, may accept employment with any other employer without the School's written permission. An employee who accepts such employment without the School's written permission will be deemed to have resigned from employment at the School.

## **Pregnancy Disability Leave**

This policy explains how the School complies with the California Pregnancy Disability Act, which requires the School to give each female employee an unpaid leave of absence of up to four (4) months, per pregnancy, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

### Employee Eligibility Criteria

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

### Events That May Entitle an Employee to Pregnancy Disability Leave

The four (4) -month pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

1. The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk to herself, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
2. The employee needs to take time off for prenatal care.

### Duration of Pregnancy Disability Leave

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "Four months" means the number of days the employee would normally work within four months. For a full-time employee who works five (5) eight (8) hour days per week, four (4) months means 693 hours of leave (40 hours per week times 17 1/3 weeks).

For employees who work more or less than forty (40) hours per week, or who work on variable work schedules, the number of working days that constitutes four (4) months is calculated on a pro rata or proportional basis. For example, for an employee who works twenty (20) hours per week, "four months" means 346.5 hours of leave entitlement (20 hours per week times 17 1/3 weeks). For an employee who normally works forty-eight (48) hours per week, "four months" means 832 hours of leave entitlement (48 hours per week times 17 1/3 weeks).

At the end or depletion of an employee's pregnancy disability leave, an employee who has a physical or mental disability (which may or may not be due to pregnancy, childbirth, or related medical conditions) may be entitled to reasonable accommodation. Entitlement to additional leave must be determined on a case-by case basis, taking into account a number of considerations such as whether an extended leave is likely to be effective in allowing the employee to return to work at the end of the leave, with or without further reasonable accommodation, and whether or not additional leave would create an undue hardship for the School. The School is not required to provide an indefinite leave of absence as a reasonable accommodation.

### Pay during Pregnancy Disability Leave

1. An employee on pregnancy disability leave must use all accrued paid sick leave and may use any or all accrued vacation time at the beginning of any otherwise unpaid leave period.
2. The receipt of vacation pay, sick leave pay, or state disability insurance benefits, will not extend the length of pregnancy disability leave.
3. Vacation and sick pay accrues during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began.

### Health Benefits

The Charter School shall provide continued health insurance coverage while an employee is on pregnancy disability leave consistent with applicable law. The continuation of health benefits is for a maximum of four (4) months in a twelve (12) -month period. The Charter School can recover premiums that it already paid on behalf of an employee if both of the following conditions are met:

1. The employee fails to return from leave after the designated leave period expires.
2. The employee's failure to return from leave is for a reason other than the following:
  - The employee is taking leave under the California Family Rights Act.
  - There is a continuation, recurrence or onset of a health condition that entitles the employee to pregnancy disability leave.
  - There is a non-pregnancy related medical condition requiring further leave.
  - Any other circumstance beyond the control of the employee.

### Seniority

An employee on pregnancy disability leave remains an employee of the School and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, she will return with the same seniority she had when the leave commenced.

### Medical Certifications

1. An employee requesting a pregnancy disability leave must provide medical certification from her healthcare provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.
2. Recertifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required recertifications can result in termination of the leave.

### Requesting and Scheduling Pregnancy Disability Leave

1. An employee should request pregnancy disability leave by completing a Request for Leave form and submitting it to the Executive Administrator. An employee asking for a Request for Leave form will be referred to the School's then current pregnancy disability leave policy.
2. Employee should provide not less than thirty (30) days' notice or as soon as is practicable, if the need for the leave is foreseeable. Failure to provide such notice is grounds for denial of the leave request, except if the need for pregnancy disability leave was an emergency and was otherwise unforeseeable.
3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.
4. Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.
5. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.
6. The School will respond to a pregnancy disability leave request within (10) days of receiving the



request. If a pregnancy disability leave request is granted, the School will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

### Return to Work

1. Upon timely return at the expiration of the pregnancy disability leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position at the time reinstatement is requested. If the employee is not reinstated to the same position, she must be reinstated to a comparable position unless one of the following is applicable:
  - a. The employer would not have offered a comparable position to the employee if she would have been continuously at work during the pregnancy disability leave.
  - b. There is no comparable position available, to which the employee is either qualified or entitled, on the employee's scheduled date of reinstatement or within sixty (60) calendar days thereafter. The School will take reasonable steps to provide notice to the employee if and when comparable positions become available during the sixty (60) day period.

A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.

2. When a request for pregnancy disability leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).
3. In accordance with Charter School policy, before an employee will be permitted to return from a pregnancy disability leave of three (3) days or more, the employee must obtain a certification from her healthcare provider that she is able to resume work.
4. If the employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

### Employment during Leave

No employee, including employees on pregnancy disability leave, may accept employment with any other employer without the School's written permission. An employee who accepts such employment without written permission will be deemed to have resigned from employment.

### **Industrial Injury Leave (Workers' Compensation)**

The Charter School, in accordance with State law, provides insurance coverage for employees in case of work-related injuries. The workers' compensation benefits provided to injured employees may include:

- Medical care;
- Cash benefits, tax-free to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure employees receive any worker's compensation benefits to which they may be entitled, employees will need to:

- Immediately report any work-related injury to the Executive Administrator;
- Seek medical treatment and follow-up care if required;
- Complete a written Employee's Claim Form (DWC Form 1) and return it to the Executive Administrator; and

- Provide the School with a certification from a health care provider regarding the need for workers' compensation disability leave as well as the employee's eventual ability to return to work from the leave.

It is the School's policy that when there is a job-related injury, the first priority is to ensure that the injured employee receives appropriate medical attention. The Charter School, with the help of its insurance carrier has selected medical centers to meet this need. Each medical center was selected for its ability to meet anticipated needs with high quality medical service and a location that is convenient to the School's operation.

- If an employee is injured on the job, he/she is to go or be taken to the approved medical center for treatment. If injuries are such that they require the use of emergency medical systems ("EMS") such as an ambulance, the choice by the EMS personnel for the most appropriate medical center or hospital for treatment will be recognized as an approved center.
- All accidents and injuries must be reported to the Executive Administrator and to the individual responsible for reporting to the School's insurance carrier. Failure by an employee to report a work-related injury by the end of his/her shift could result in loss of insurance coverage for the employee. An employee may choose to be treated by his/her personal physician at his/her own expense, but he/she is still required to go to the School's approved medical center for evaluation. All job-related injuries must be reported to the appropriate State Workers' Compensation Bureau and the insurance carrier.
- When there is a job-related injury that results in lost time, the employee must have a medical release from the School's approved medical facility before returning to work.
- Any time there is a job-related injury, the School's policy requires drug/alcohol testing along with any medical treatment provided to the employee.

## **Military and Military Spousal Leave of Absence**

The Charter School shall grant a military leave of absence to any employee who must be absent from work due to service in the uniformed services in accordance with the Uniformed Services Employment and Re-Employment Rights Act of 1994 ("USERRA"). All employees requesting military leave must provide advance written notice of the need for such leave, unless prevented from doing so by military necessity or if providing notice would be impossible or unreasonable.

If military leave is for thirty (30) or fewer days, the School shall continue the employee's health benefits. For service of more than thirty (30) days, employee shall be permitted to continue their health benefits at their option through COBRA. Employees are entitled to use accrued vacation or paid time off as wage replacement during time served, provided such vacation/paid time off accrued prior to the leave.

Except for employees serving in the National Guard, the Charter School will reinstate those employees returning from military leave to their same position or one of comparable seniority, status, and pay if they have a certificate of satisfactory completion of service and apply within ninety (90) days after release from active duty or within such extended period, if any, as required by law.

For those employees serving in the National Guard, if he or she left a full-time position, the employee must apply for reemployment within forty (40) days of being released from active duty, and if he or she left part-time employment, the employee must apply for reemployment within five (5) days of being released from active duty.

An employee who was absent from work while fulfilling his or her covered service obligation under the USERRA or California law shall be credited, upon his or her return to the School, with the hours of service that would have been performed but for the period of absence from work due to or necessitated by USERRA-covered service.

Exceptions to this policy will occur wherever necessary to comply with applicable laws.

The Charter School shall grant up to ten (10) days of unpaid leave to employees who work more than twenty (20) hours per week and who are spouses of deployed military servicemen and servicewomen. The leave may be taken when the military spouse is on leave from deployment during a time of military conflict. To be eligible for leave, an employee must provide the School with (1) notice of intention to take military spousal leave within two (2) business days of receiving official notice that the employee's military spouse will be on leave from deployment, and (2) documentation certifying that the employee's military spouse will be on leave from deployment during the time that



the employee requests leave.

## **Bereavement Leave**

All employees who have worked for the School for at least thirty (30) days shall be eligible to take up to five (5) days of paid bereavement leave per rolling 12-month period due to the death of a covered family member (spouse/domestic partner, child/stepchild, parent, sibling, grandparent, grandchild, parent-in-law, or parent or child of a domestic partner).

Bereavement leave must be utilized within three (3) months of the covered family member's date of death. Bereavement pay will not be used in computing overtime pay. Any scheduled days off (including weekends, holidays and vacations) falling during the absence will be counted as both bereavement leave and scheduled days off. Exempt employees who work any portion of a workweek in which they also take unpaid bereavement leave will receive their full salary for that work week. Employees eligible to accrue and take vacation under the Charter School's Vacation policy may elect to substitute accrued vacation days during any unpaid bereavement leave.

The Charter School retains the right to request verification from a funeral home or equivalent entity for any absences taken under the Charter School's Bereavement policy.

## **Jury Duty or Witness Leave**

All regular full-time employees will be granted paid time off for jury duty for up to five (5) working days per rolling twelve (12) month period, regardless of whether they work on a ten (10) month, eleven (11) month or twelve (12) month basis.

All other employees will receive time off without pay for the entire duration of the jury duty. Likewise, any time beyond five (5) working days necessary to complete jury duty will be without pay for those employees receiving paid jury duty for the first five (5) days. Exempt employees who work any portion of a workweek in which they also take unpaid jury duty leave will receive their full salary for that workweek. Employees eligible to accrue and take vacation under the Charter School's Vacation policy may elect to substitute accrued vacation days during any unpaid leave due to jury duty.

An employee receiving pay while on jury duty (whether Jury Duty pay or Vacation pay) will be paid at his or her regular rate of pay for the hours the employee is regularly scheduled to work, regardless of the time actually spent at jury duty.

If it is possible to do so, Teachers are requested to complete jury duty during a time period when school is not in session.

Teachers, Administrative, Administrative Support, and Staff Employees must inform their supervisor and Administrators need to inform the Executive Director of the need for jury duty as soon as they receive the summons or subpoena to appear. To request time off (whether paid or unpaid), employees must submit a copy of the court summons to the Human Resources contact. If a Teacher is excused from court, he or she need not report to work during that same workday. Any other employee should return to work if he or she will be able to work at least two (2) hours during the normal workday after being excused from court. Once jury duty is completed, the employee must submit to the Human Resource contact a receipt from the court verifying the time spent in court. If the employee receives per diem pay from the court for a day that the Charter School provided the employee with paid jury duty leave, the employee should return that per diem pay to the Charter School. Employees may keep any travel allowance they received from the court.

## **Voting Time Off**

If an employee does not have sufficient time outside of working hours to vote in an official state-sanctioned election, the employee may take off enough working time to vote. Such time off shall be taken at the beginning or the end of the regular working shift, whichever allows for more free time and the time taken off shall be combined with the voting time available outside of working hours to a maximum of two (2) hours combined. Under these circumstances, an employee will be allowed a maximum of two (2) hours of time off during an election day without loss of pay. When possible, an employee requesting time off to vote shall give the Executive Administrator at least two (2) days' notice.

## **School Appearance and Activities Leave**

As required by law, the Charter School will permit an employee who is a parent or guardian (including a stepparent, foster parent, or grandparent) of school children, from kindergarten through grade twelve (12), or a child enrolled with a licensed child care provider, up to forty (40) hours of unpaid time off per school year (up to eight (8) hours in any calendar month of the school year) to participate in activities of a child's school or child care. If more than one (1) parent or guardian is an employee of the Charter School, the employee that first provides the leave request will be given the requested time off. Where necessary, additional time off will also be permitted where the school requires the employee(s) appearance.

The employee requesting school leave must provide reasonable advanced notice of the planned absence. The employee must use accrued but unused paid leave (e.g., vacation or sick leave) to be paid during the absence.

When requesting time off for school activities, the employee must provide verification of participation in an activity as soon as practicable. When requesting time off for a required appearance, the employee(s) must provide a copy of the notice from the child's school requesting the presence of the employee.

## **Bone Marrow and Organ Donor Leave**

As required by law, eligible employees who require time off to donate bone marrow to another person may receive up to five (5) workdays off in a twelve (12) month period. Eligible employees who require time off to donate an organ to another person may receive up to sixty (60) workdays off in a twelve (12)-month period.

To be eligible for bone marrow or organ donation leave ("Donor Leave"), the employee must have been employed by the School for at least ninety (90) days immediately preceding the Donor Leave.

An employee requesting Donor Leave must provide written verification to the School that he or she is a donor and that there is a medical necessity for the donation of the organ or bone marrow.

Up to five (5) days of leave for bone marrow donation, and up to thirty (30) days of leave for organ donation, may be paid provided the employee uses five (5) days of accrued paid leave for bone marrow donation and two (2) weeks of accrued paid leave for organ donation. If the employee has an insufficient number of paid leave days available, the leave will otherwise be paid.

Employees returning from Donor Leave will be reinstated to the position held before the leave began, or to a position with equivalent status, benefits, pay and other terms and conditions of employment. The School may refuse to reinstate an employee if the reason is unrelated to taking a Donor Leave. A Donor Leave is not permitted to be taken concurrently with an FMLA/CFRA Leave.

## **Victims of Abuse Leave**

Charter School provides reasonable and necessary unpaid leave and other reasonable accommodations to employees who are victims of domestic violence, sexual assault, stalking or other crimes. Such leave may be taken to attend legal proceedings or to obtain or attempt to obtain any relief necessary, including a restraining order, to ensure the employee's own health, safety or welfare, that of the employee's child or children or when a person whose immediate family member is deceased as the direct result of a crime. A crime includes a crime or public offense that would constitute a misdemeanor or felony if the crime had been committed in California by a competent adult, an act of terrorism against a resident of California (whether or not such act occurs within the state), and regardless of whether any person is arrested for, prosecuted for, or convicted of, committing the crime. Employees may also request unpaid leave for the following purposes:

- Seek medical attention for injuries caused by domestic violence, sexual assault, or stalking.
- Obtain services from a domestic violence shelter, program, or rape crisis center.
- Obtain psychological counseling for the domestic violence, sexual assault, or stalking.
- Participate in safety planning, such as relocation, to protect against future domestic violence, sexual assault, or stalking.

To request leave under this policy, an employee should provide Charter School with as much advance notice as practicable under the circumstances. If advance notice is not possible, the employee requesting leave under this policy should provide Charter School one (1) of the following certifications upon returning back to work:

1. A police report indicating that the employee was a victim of domestic violence, sexual assault, or stalking.
2. A court order protecting the employee from the perpetrator or other evidence from the court or prosecuting

attorney that the employee appeared in court.

3. Documentation from a licensed medical professional, domestic violence or sexual assault counselor, licensed health care provider, or counselor showing that the employee's absence was due to treatment for injuries or abuse from domestic violence, sexual assault, or stalking.
4. Any other form of documentation that reasonably verifies that the crime or abuse occurred, including but not limited to, a written statement signed by the employee, or an individual acting on the employee's behalf, certifying that the absence is for a purpose authorized under the law.

Employees requesting leave under this policy may choose to use accrued paid leave. In addition, Charter School will provide reasonable accommodations to employees who are victims of domestic violence, sexual assault or stalking for the employees' safety while at work. To request an accommodation under this policy, an employee should contact the Executive Administrator.

## **Returning from Leave of Absence**

Employees cannot return from a medical leave of absence without first providing a sufficient doctor's return to work authorization.

When business considerations require, the job of an employee on leave may be filled by a temporary or regular replacement. An employee should give the Executive Administrator thirty (30) days' notice before returning from leave. Whenever the School is notified of an employee's intent to return from a leave, the School will attempt to place the employee in his former position or in a comparable position with regard to salary and other terms and conditions for which the employee is qualified. However, re-employment cannot always be guaranteed. If employees need further information regarding Leaves of Absence, they should be sure to consult the Executive Administrator.

## DISCIPLINE AND TERMINATION OF EMPLOYMENT

### Rules of Conduct

The following conduct is prohibited and will not be tolerated by the School. This list of prohibited conduct is illustrative only and applies to all employees of the School; other types of conduct that threaten security, personal safety, employee welfare and the School's operations also may be prohibited. Further, the specification of this list of conduct in no way alters the at-will employment relationship as to at-will employees of the School. If an employee is working under a contract with the School which grants procedural rights prior to termination, the procedural terms in the contract shall apply.

1. Insubordination - refusing to perform a task or duty assigned or act in accordance with instructions provided by an employee's manager or proper authority.
2. Unprofessional/uncivil conduct.
3. Inefficiency - including deliberate restriction of output, carelessness or unnecessary wastes of time or material, neglect of job, duties or responsibilities.
4. Unsatisfactory performance/failure to meet performance standards.
5. Lack of fitness for service, including the inability or failure to appropriately instruct or associate with students.
6. Failing to actively participate in any Charter School committee to which the individual has been assigned by the Charter School's Director or Executive Director.
7. Failing to attend mandatory staff meetings or professional development meetings.
8. Making false statements regarding any Charter School employee, supervisor, student, student's family members or visitor, or making threats of using abusive or otherwise inappropriate language toward Charter School employees, supervisors, students, students; family members or visitors.
9. Engaging in any inappropriate verbal, visual or physical conduct in the presence of a Charter School student or students' family members, or in the presence of any child on the Charter School campus or during a Charter School-sponsored event.
10. Use of profane, abusive or threatening language in conversations with other employees and/or intimidating or interfering with other employees.
11. Damaging, defacing, unauthorized removal, destruction or theft of another employee's property or of School property.
12. Unauthorized use, possession, alteration or transfer of Charter School supplies, technology resources or other Charter School property; or removing Charter School technology resources, records, documents or other Charter School property from the workplace without authorization from the employee's supervisor or the Charter School Director.
13. Refusing/failing to comply with any Charter School rule, policy or procedure, including but not limited to safety, health, and security policies and rules, the Charter School policy against harassment, the Charter School policy concerning violence in the workplace and the Charter School drug-free workplace policy.
14. Refusing or failing to keep parents informed of issues involving their child, refusing to respond to parents' concerns/communications in an appropriate manner, or failing to notify the Charter School's Director of any actual or potential issues involving the employee and the parent's relationship.
15. Failing to report any known or suspected physical or emotional abuse of a child as required by the Child Abuse and Neglect Reporting Act.
16. Photographing Charter School employees, students, students' families or visitors without adult

authorization.

17. Fighting or instigating a fight on School premises.
18. Using or possessing firearms, weapons or explosives of any kind on School premises.
19. Gambling on School premises.
20. Tampering with or falsifying any report or record including, but not limited to, personnel, absentee, sickness or production reports or records, specifically including applications for employment and time cards.
21. Recording the clock card, when applicable, of another employee or permitting or arranging for another employee to record your clock card.
22. Conducting personal business during business hours and/or unauthorized use of telephone lines for personal calls.
23. Excessive absenteeism or tardiness excused or unexcused (failure to work schedule given)
24. Failing to promptly inform the Charter School Director or the front office when unable to report for work or when leaving work early.
25. Misrepresentation of information in connection with any leave of absence from work or application for or use of any Charter School benefit.
26. Posting any notices on School premises without prior written approval of management, unless posting is on a School bulletin board designated for employee postings.
27. Unauthorized soliciting, collecting of contributions, distribution of literature, written or printed matter is strictly prohibited on School property by non-employees and by employees. This rule does not cover periods of time when employees are off their jobs, such as lunch periods and break times. However, employees properly off their jobs are prohibited from such activity with other employees who are performing their work tasks.
28. Immoral or indecent conduct.
29. Conviction of a criminal act.
30. Engaging in sabotage or espionage (industrial or otherwise)
31. Failure to report a job-related accident to the employee's manager or failure to take or follow prescribed tests, procedures or treatment.
32. Sleeping during work hours.
33. Release of confidential information without authorization.
34. Any other conduct detrimental to other employees or the School's interests or its efficient operations.
35. Engaging in any conduct that has a negative impact on the Charter School's overall school climate, the ability of faculty to work together as a team, the Charter School's ability to provide a positive environment for its students or the Charter School's ability to educate its students.
36. Any act or acts which cause the Charter School to be unable to invest the amount of trust or confidence required to continue employment.
37. Refusal to speak to supervisors or other employees.
38. Dishonesty.
39. Failure to possess or maintain the credential/certificate required of the position.

For employees who possess an employment contract which provides for other than at-will employment, the procedures and process for termination during the contract shall be specified in the contract.

Nothing in this Termination, Discipline, and Rules of Conduct policy (or in any other policy in this handbook) is intended to alter the employee's at-will status of employment with the Charter School. In addition, no disciplinary procedure or progressive disciplinary process implemented by the Charter School at any time is intended to alter the at-will status of employment with the Charter School. Please refer to the At-Will Employment Policy for more information.

## **Off-Duty Conduct**

While the School does not seek to interfere with the off-duty and personal conduct of its employees, certain types of off-duty conduct may interfere with the School's legitimate business interests. For this reason, employees are expected to conduct their personal affairs in a manner that does not adversely affect the School or its own integrity, reputation, or credibility. Illegal or immoral off-duty conduct by an employee that adversely affects the School's legitimate business interests or the employee's ability to perform his or her work will not be tolerated.

While employed by the School, employees are expected to devote their energies to their jobs with the School. For this reason, second jobs are strongly discouraged. The following types of additional employment elsewhere are strictly prohibited:

- Additional employment that conflicts with an employee's work schedule, duties, and responsibilities at our School.
- Additional employment that creates a conflict of interest or is incompatible with the employee's position with our School.
- Additional employment that impairs or has a detrimental effect on the employee's work performance with our School.
- Additional employment that requires the employee to conduct work or related activities on the School's property during the employer's working hours or using our School's facilities and/or equipment; and
- Additional employment that directly or indirectly competes with the business or the interests of our School.

Employees who wish to engage in additional employment that may create a real or apparent conflict of interest must submit a written request to the School explaining the details of the additional employment. If the additional employment is authorized, the School assumes no responsibility for it. The Charter School shall not provide workers' compensation coverage or any other benefit for injuries occurring from or arising out of additional employment. Authorization to engage in additional employment can be revoked at any time.

## **Termination of Employment**

Should it become necessary for an employee to terminate their at-will employment with the School, employees should notify the Executive Administrator regarding their intention as far in advance as possible. At least two (2) weeks' notice is expected whenever possible.

When you terminate your at-will employment, you will be entitled to all earned but unused vacation pay. If you are participating in the medical and/or dental plan, you will be provided information on your rights under COBRA.

## **Reductions In Force/Layoffs**

A reduction in force is the separation of an employee for lack of work or funds, or programmatic change, as determined by YPICS, without fault or delinquency on the employee's part.

A. Employees to be laid off shall be notified as soon as possible after the decision for reduction in force has been made. In no event shall YPICS give an employee less than thirty (30) calendar days written notice.

Employees shall be laid off in accordance with the following criteria:

- a. Programmatic need

- b. Employee credentials and qualifications
- c. Performance evaluations
- d. Expertise/relevant experience

In the absence of substantial distinguishing differences in the above criteria, length of service at YPICS shall be the determining factor.

## **Verification and Reference Policy**

All requests for employment verification, references or personal information verification or disclosures must be directed to the Human Resources contact. No one other than the Human Resources contact and the Executive Director is authorized to provide verifications or references, or disclose personal information, pertaining to current or former employees. With respect to verification requests, the Charter School will disclose only the employee's dates of employment and the title of the last position held. The Charter School will verify or disclose additional information about the employee only if the employee provides written authorization for the Charter School to provide the information. However, the Charter School will provide information about current or former employees as required by law or court order. The Charter School will not provide any letters of reference for current or former employees. Please refer all questions about this policy to the Human Resources contact. Nothing in this policy shall prohibit employees from writing letters of reference in their personal capacity; such letters may not be on the Charter School's letterhead.



## **INTERNAL COMPLAINT REVIEW**

### **Open Door Policy**

Employees who have job-related concerns or complaints are encouraged to discuss them with your Executive Administrator, the Chief Operations Officer, or Executive Director, or any other management representative with whom they feel comfortable. The Charter School believes that employee concerns are best addressed through this type of informal and open communication. Employees are encouraged to raise their work-related concerns with your Executive Administrator, the Chief Operations Officer, or Executive Director or other management representative as soon as possible after the events that cause the concern.

The purpose of the “Internal Complaint Review Policy” is to afford all employees of the School the opportunity to seek internal resolution of their work-related concerns. All employees have free access to the Executive Administrator, the Chief Operations Officer, Executive Director, or Board of Directors to express their work-related concerns.

Specific complaints of unlawful harassment, discrimination, and retaliation are addressed under the School’s “Policy Prohibiting Unlawful Harassment, Discrimination, and Retaliation.”

### **Internal Complaints**

(Complaints by Employees Against Employees)

This section of the policy is for use when a School employee raises a complaint or concern about a co-worker.

If reasonably possible, internal complaints should be resolved at the lowest possible level, including attempts to discuss/resolve concerns with the immediate supervisor. However, in the event an informal resolution may not be achieved or is not appropriate, the following steps will be followed by the Executive Administrator or designee:

1. The complainant will bring the matter to the attention of the Executive Administrator as soon as possible after attempts to resolve the complaint with the immediate supervisor have failed or if not appropriate; and
2. The complainant will reduce his or her complaint to writing, indicating all known and relevant facts. The Executive Administrator or designee will then investigate the facts and provide a solution or explanation;
3. If the complaint is about the Executive Administrator, the complainant may file his or her complaint to the Senior Director of Programs and HR. The Senior Director of Programs and HR will then investigate the facts and provide a solution or explanation;
4. If the complaint is about the Executive Director, the complainant may file his or her complaint in a signed writing to the President of the School’s Board of Directors, who will then confer with the Board and may conduct a fact-finding or authorize a third party investigator on behalf of the Board. The Board President or investigator will report his or her findings to the Board for review and action, if necessary.

This policy cannot guarantee that every problem will be resolved to the employee’s satisfaction. However, the School values each employee’s ability to express concerns and the need for resolution without fear of adverse consequence to employment.

### **Policy for Complaints Against Employees**

(Complaints by Third Parties Against Employees)

This section of the policy is for use when a non-employee raises a complaint or concern about a School employee.

If complaints cannot be resolved informally, complainants may file a written complaint with the office of the Executive Director or Board President (if the complaint concerns the Executive Administrator) as soon as possible after the events that give rise to the complainant’s concerns. The written complaint should set forth in detail the factual basis for the complaint.

In processing the complaint, the Executive Director (or designee) shall abide by the following process:

1. The Executive Director or designee shall use his or her best efforts to talk with the parties identified in the



complaint and to ascertain the facts relating to the complaint.

2. In the event that the Executive Director (or designee) finds that a complaint against an employee is valid, the Executive Director (or designee) may take appropriate disciplinary action against the employee. As appropriate, the Executive Administrator (or designee) may also simply counsel/reprimand employees as to their conduct without initiating formal disciplinary measures.
3. The Executive Director's (or designee's) decision relating to the complaint shall be final unless it is appealed to the Board of Directors. The decision of the Board shall be final.

## **General Requirements**

1. Confidentiality: All complainants will be notified that information obtained from the complainants and thereafter gathered will be maintained in a manner as confidential as possible, but in some circumstances absolute confidentiality cannot be assured.
2. Non-Retaliation: All complainants will be advised that they will be protected against retaliation as a result of the filing of any complaints or participation in any complaint process.
3. Resolution: The Board (if a complaint is about the Executive Administrator) or the Executive Administrator or designee will investigate complaints appropriately under the circumstances and pursuant to the applicable procedures, and if necessary, take appropriate remedial measures to ensure effective resolution of any complaint.

## **AMENDMENT TO EMPLOYEE HANDBOOK**

This Employee Handbook contains the employment policies and practices of the School in effect at the time of publication.

The Charter School reserves the right to amend, delete or otherwise modify this Handbook at any time provided that such modifications are in writing and duly approved by the employer.

Any written changes to the Handbook will be distributed to all employees. No oral statements can in any way alter the provisions of this Handbook.

## APPENDIX A

### **HARASSMENT/DISCRIMINATION/RETALIATION COMPLAINT FORM**

*It is the policy of the School that all of its employees be free from harassment, discrimination, and retaliation. This form is provided for you to report what you believe to be harassment, discrimination, or retaliation so that the School may investigate and take appropriate disciplinary or other action when the facts show that there has been harassment, discrimination, or retaliation.*

*If you are an employee of the School, you may file this form with the Executive Administrator or Board President.*

*Please review the School's policies concerning harassment, discrimination, and retaliation for a definition of such unlawful conduct and a description of the types of conduct that are considered to be unlawful.*

*The Charter School will undertake every effort to handle the investigation of your complaint in a confidential manner. In that regard, the School will disclose the contents of your complaint only to those persons having a need to know. For example, to conduct its investigation, the School will need to disclose portions of your factual allegations to potential witnesses, including anyone you have identified as having knowledge of the facts on which you are basing your complaint, as well as the alleged offender.*

*In signing this form below, you authorize the School to disclose to others the information you have provided herein, and information you may provide in the future. Please note that the more detailed information you provide, the more likely it is that the School will be able to address your complaint to your satisfaction.*

*Charges of harassment, discrimination, and retaliation are taken very seriously by the School both because of the harm caused by such unlawful conduct, and because of the potential sanctions that may be taken against the offender. It is therefore very important that you report the facts as accurately and completely as possible and that you cooperate fully with the person or persons designated to investigate your complaint.*

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Alleged Incident(s): \_\_\_\_\_

Name of Person(s) you believe harassed, or discriminated or retaliated against you or someone else: \_\_\_\_\_

List any witnesses that were present: \_\_\_\_\_

Where did the incident(s) occur? \_\_\_\_\_

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

\_\_\_\_\_  
\_\_\_\_\_

---

---

---

I acknowledge that I have read and that I understand the above statements. I hereby authorize the School to disclose the information I have provided as it finds necessary in pursuing its investigation.

I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief.

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Received by: \_\_\_\_\_ Date: \_\_\_\_\_

## APPENDIX B

### INTERNAL COMPLAINT FORM

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Alleged Incident(s): \_\_\_\_\_

Name of Person(s) you have a complaint against: \_\_\_\_\_

List any witnesses that were present: \_\_\_\_\_

Where did the incident(s) occur? \_\_\_\_\_

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

---

---

---

---

---

---

---

---

I hereby authorize the School to disclose the information I have provided as it finds necessary in pursuing its investigation. I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief. I further understand providing false information in this regard could result in disciplinary action up to and including termination.

\_\_\_\_\_  
Signature of Complainant

Date: \_\_\_\_\_

\_\_\_\_\_  
Print Name

To be completed by School:

Received by: \_\_\_\_\_

Date: \_\_\_\_\_



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve Board of Trustees for 2023-2024**

Terms of office for the following board members will expire on June 30, 2023:

### ANALYSIS

An Ad Hoc Nominating Committee chaired by the Board Chair worked with the Executive Director and Chief Operations Officer to determine the following recommendation for the Board of Trustees for the 2023-2024 school year:

Board Member	Term
Mary Keipp	Board Chair Term Expires: 6/30/2025
Cesar Lopez	Board Vice-Chair Expires: 6/30/2025
Michael Green	Board Treasurer Term Expires: 6/30/2024
Sandra Mendoza	Board Secretary Term Expires: 6/30/2024
Walter Njboke	Board Member Term Expires: 6/30/2024
Dean Cho	Board Member Term Expires: 6/30/25

### RECOMMENDATION:

It is recommended that the Board of Trustees approve the slate of Trustees recommended by the Ad Hoc Board Selection Committee.



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

### **Recommendation to approve continued membership in Charter Schools Development Center**

#### **BACKGROUND**

The Charter Schools Development Center was established in 2004 as a membership & business development, and advocacy organization serving charter school developers and California Charter School Leaders as well.

#### **ANALYSIS**

The membership dues have remained at \$3.00 per student. The fee has not changed since the organization began.

#### **RECOMMENDATION**

It is recommended that the Board of Directors approve continued membership in the Charter Schools Development Center at a cost of \$3.00 per student and an approximate total cost of \$2,523.00 for FY2024 only with future and continued membership (and fees) to be determined by the board.

**Attachment:** *CSDC Membership Invoice FY 2024*

**CHARTER SCHOOLS  
DEVELOPMENT CENTER**  
817 14th Street, Suite 300  
Sacramento, CA 95814-  
2923  
<http://www.chartercenter.org>



# INVOICE

**BILL TO**

Youth Policy Institute Charter  
Schools, Inc.  
10660 White Oak Avenue  
Suite B101  
Granada Hills, CA 91344

**INVOICE #** 23427  
**DATE** 06/21/2023  
**DUE DATE** 07/21/2023  
**TERMS** Net 30

DATE	ACTIVITY	QTY	RATE	AMOUNT
	<b>CSDC Membership</b> CSDC Membership: 1 year membership (membership will begin once payment is received.): Bert Corona Charter School	344	3.00	1,032.00
	<b>CSDC Membership</b> CSDC Membership: 1 year membership (membership will begin once payment is received.): Bert Corona Charter High School	202	3.00	606.00
	<b>CSDC Membership</b> CSDC Membership: 1 year membership (membership will begin once payment is received.): Monsenor Oscar Romero Charter Middle School	295	3.00	885.00

Please make a bank transfer or credit card payment  
directly through the "Review and Pay" button in the  
invoice email.

**BALANCE DUE**

**\$2,523.00**

Or send a check payable to Charter Schools  
Development Center to our PO box below.

PO Box 15126, Sacramento, CA 95851



# **YPI Charter Schools Inc. (YPICS) Fiscal Policies & Procedures**

Approved 10-31-2022

## Table of Contents

<b>Introduction</b>	2
<b>Accounting Procedures</b>	2
Basis of Accounting	2
Bank Reconciliations	2
Record Keeping	3
<b>Internal Controls</b>	3
Lines of Authority	3
Segregation of Duties	4
<b>Financial Planning &amp; Reporting</b>	4
Budgeting Process	4
Internal Financial Reports	5
Audit	5
Tax Compliance	6
<i>Exempt Organization Returns</i>	6
<i>Quarterly/Annual Payroll Reports</i>	6
<b>Revenue &amp; Accounts Receivable</b>	6
Cash Receipts	6
Deposits	7
<b>Expense &amp; Accounts Payable</b>	7
Payroll	7
<i>Time Sheet Preparation &amp; Approval</i>	8
<i>Payroll Additions, Deletions, and Changes</i>	8
<i>Payroll Preparation &amp; Approval</i>	8
<i>Pay Upon Termination</i>	9
Purchases & Procurement	10
Credit Cards	11
Debit Cards	11
Independent Contractors	11
Invoice Approval & Processing	12
Cash Disbursements	12
Petty Cash	13
Employee and Volunteer Expense Reimbursements	13
<i>Travel Expenses</i>	14
<i>Governing Board Expenses</i>	14
<b>Asset Management</b>	15
Cash Management and Investments	15
Capital Equipment	15
Loans	15
Insurance	16
Parking Lot Liability	16
Operating Reserve	16

## Introduction

The Governing Board of YPI Charter Schools Inc. (YPICS) has reviewed and adopted the following policies and procedures to ensure the most effective use of the funds of YPI Charter Schools Inc. to support its mission and to ensure that the funds are budgeted, accounted for, expended and maintained appropriately.

## Accounting Procedures

This section covers basic accounting procedures for the organization. The accounting procedures used by the organization shall conform to Generally Accepted Accounting Principles (GAAP) to ensure accuracy of information and compliance with external standards.

### Basis of Accounting

**Policy:** The organization uses the accrual-basis of accounting at year-end, meaning that revenues are recorded when earned, and expenses are recorded when a liability is incurred regardless of when the receipt or payment of cash takes place.

#### Procedures:

- Throughout the fiscal year, revenue is recorded in the month in which it is received and expenses are recorded in the month in which they occur.
- At the close of the fiscal year, all revenue earned in the fiscal year, but not received is accrued. All expenses that have been incurred but not paid are also accrued. This ensures that the year-end financial statements reflect all revenue earned and all expenses incurred during the fiscal year.
- Year-end books, inclusive of adjusting journal entries, are closed by December 15, the date by which the audit report must be submitted to the state controller and respective reporting agencies.

### Bank Reconciliations

**Policy:** Bank reconciliation and approval will occur on a monthly basis.

#### Procedures:

- The ExED AA/SAA will prepare the bank reconciliation using ExED's bank reconciliation workbook.
- The Accounting Manager or Vice President, School Finance assigned to the organization will review and approve the bank reconciliation workbook by completing the approval tab of the bank reconciliation workbook.

### Record Keeping

**Policy:** Financial records will be retained for a minimum of seven years or as outlined in the 990 policy.

**Procedures:**

- ExED will retain financial records, including transaction ledgers, canceled/duplicate checks, attendance and entitlement records, payroll record, and any other necessary fiscal documentation at its site until the prior year audit has been completed.
- ExED will deliver financial records to the organization for storage for the remaining years of the seven year retention period.
- At the discretion of the Governing Board or Executive Director, certain documentation may be maintained for a longer period of time.
- Financial records will be shredded at the end of their retention period.
- Backup copies of electronic and/or paper documentation should be stored in a secure location.

## Internal Controls

The organization employs several safeguards to ensure that financial transactions are properly authorized, appropriated, executed and recorded.

All documentation related to financial matters will be completed by computer, typewriter, or ink. Completion by pencil is not permitted.

## Lines of Authority

### Governing Board

- Approves the fiscal policies and procedures and delegates administration of the policies and procedures to the Executive Director.
- Ensures that the fiscal policies and procedures are current, meaning that they have been reviewed and updated annually.
- Approves the opening and closing of bank accounts and the list of authorized signers and the organization address on record.
- Approves all third-party loans.
- Approves the opening of business credit cards.
- Reviews and approves the annual budget.
- Reviews annual and monthly financial statements, including the monthly check register and the ExED-prepared financial dashboard and budget-to-actual variance analysis.
- Reviews the Executive Director's performance annually and establishes the salary.
- Reviews and approves all contracts over \$50,000.
- Reviews and approves all non-budgeted expenditures over \$50,000 and any irregular expenditures.
- Commissions the annual financial audit by an independent third party auditor approved by the State of California.
- Approves the annual financial audit by December 15.
- Appoints someone else to perform the duties of the Executive Director in the case of absence.

### Executive Director

- Is responsible for all operations and activities related to financial management.
- Develops the annual budget with ExED.
- Reviews and approves all contracts under \$50,000.

- Reviews and approves all expenditures under \$50,000.
- Oversees the adherence to all internal controls.
- Appoints someone else to perform his/her duties in case of absence.

#### **Chief Operations Officer**

- Serves as the designee for the Executive Director.
- Assist with the development of the annual budget with Executive Director and ExED
- Approves payroll
- Oversees budgets

#### **Executive Administrator/Assistant Executive Administrator**

- Is responsible for the daily operations and activities related to financial management
- Manage site budgets
- Approve site payroll

### **Segregation of Duties**

**Policy:** The organization's financial duties shall be distributed among multiple people to help ensure protection from fraud and error. The distribution of duties aims for maximum protection of the organization's assets while also considering efficiency of operations.

#### **Procedures:**

- Procedures for each section of this document will identify the position responsible for carrying out each function so that no single person or entity has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.

## **Financial Planning & Reporting**

### **Budgeting Process**

**Policy:** In consultation with the Executive Director and Finance Committee, ExED will prepare the annual budget for approval by the Governing Board. The budget is to be approved by the Governing Board prior to the start of each fiscal year.

#### **Procedures:**

- The Executive Director will work together with the Chief Operations Officer and Executive Administrators/Assistant Executive Administrator to ensure that the annual budget is an accurate reflection of programmatic and infrastructure goals for the coming year.
- ExED will ensure that the budget is developed using the organization's standard revenue recognition and cost allocation procedures.
- ExED, in consultation with the Governing Board, will set a target net income goal to meet strategic goals and/or comply with existing loan covenants.
- ExED will present a draft budget to the Finance Committee prior to the end of the fiscal year.
- The Finance Committee shall review and approve a recommended fiscal year budget and submit it for approval to the Governing Board.

- The Governing Board will review and approve the budget no later than its last meeting prior to the start of the fiscal year.
- ExED will prepare financial statements displaying budget vs. actual results for presentation to the Governing Board at each board meeting.

## Internal Financial Reports

**Policy:** The organization reviews regular financial reports at scheduled board meetings.

### Procedures:

- ExED is responsible for producing the following year-to-date reports within 45 days of the end of each month (in August through June): Income Statement including budget to actual variances, Balance Sheet, Financial Analysis, and Cash Flow Projection.
- ExED will also present a check register at each board meeting.
- ExED and/or the Board Treasurer will present the financial reports to the Governing Board at each meeting.

## Audit

**Policy:** The Governing Board will contract annually with a qualified independent certified public accounting firm to conduct an audit of the organization's financial statements in accordance with auditing standards generally accepted in the United States of America, *Government Auditing Standards* issued by the Comptroller General of the United States, and, if applicable, the *U.S Office of Management and Budget's Circular A-133*. The selected audit firm must be familiar with these standards, related State of California and Charter School regulations, and the *Standards and Procedures for Audits of California K-12 Local Education Agencies Audit Guide* (which can be found at <http://eaap.ca.gov/audit-guide/current-audit-guide-booklet/>), in order to properly conduct the audit engagement.

After six consecutive fiscal years, the organization will contract with a new audit firm or require a change/rotation in audit partners in the seventh year, unless a waiver is obtained from the Educational Audit Appeals Panel. (Education Code 41020).

### Procedures:

- The Governing Board will appoint an Audit Committee of one or more persons by January 1 of each year.
- The Audit Committee may include persons who are not members of the board, but may not include any members of the staff of the corporation, including the president or CEO or the treasurer or CFO. In addition, any person with expenditure authorization or recording responsibilities within the organization may not serve on the committee.
- The Audit Committee will be responsible for contracting with an audit firm by March 1 of each year, unless the existing contract is a multi-year contract.
- The Audit Committee will be responsible for reviewing the results of the annual audit and developing a corrective action plan to address all relevant weaknesses noted by the auditor.
- The Governing Board will review and approve the audit no later than December 15.
- The audit firm will be responsible for submitting the audit to all reporting agencies no later than December 15.

## Tax Compliance

### Exempt Organization Returns

**Policy:** The audit firm contracted by the Governing Board to conduct the annual financial audit will prepare the annual Federal Form 990 and the California Form 199. The tax forms are to be filed no later than May 15 of each year.

**Procedures:**

- ExED will work with the tax preparer to complete the organization's tax returns.
- The Executive Director will review the tax returns before submitting to the Governing Board for final approval prior to May 15.
- The Form 990 will be available to the public via GuideStar, an information service specializing in reporting on U.S. nonprofit companies.

### Quarterly/Annual Payroll Reports

**Policy:** ExED will prepare the state and federal quarterly and annual payroll tax forms and will submit the forms to the respective agencies within established deadlines.

**Procedures:**

- ExED will prepare employee W2s by January 31 each year.
- ExED will file quarterly payroll tax reports (941 and DE9) by the filing deadline.

## Revenue & Accounts Receivable

### Cash Receipts

**Policy:** Cash receipts (including check or cash payments received via mail or in person and deposits received via Electronic Fund Transfer) shall be recorded completely and accurately to prevent the misappropriation of assets.

**Procedures:**

- For each fundraising or other event in which cash or checks will be collected, the Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will designate a site administrator to be responsible for managing the process to collect and hold all cash and checks related to the event.
- A staff designee will record each transaction in a receipt book or document each item sold at the time the transaction is made in a log or similar.
- A staff designee shall give the cash, checks, deposit summary, and any related supporting documentation to the designated site administrator immediately.
- The designated site administrator and the staff designee will recount and reconcile the amount received with the supplied supporting documentation and each will sign for approval. The designated site administrator will immediately put the funds in a secure, locked location.

- Cash/checks dropped off in the classroom will be held by the teacher. Each morning, the teacher will collect all forms, payments, etc. that have been brought in by students that day and place them in a large envelope. Before the end of the work day, the teacher will bring the envelope from his/her classroom to the office where the cash/checks will be counted by the teacher and the designated site administrator.
- Mail (including anything official such as governmental notices, invoices and checks) received at the school must be opened by office staff members and stamped with a “received” stamp. If possible, the person opening the mail should not also be responsible for making bank deposits.
- Once a week, the Accounts Payable Department will log cash or checks received. Copies of Cash Receipt records should be sent to ExED for posting into the general ledger.
- When utilizing merchant or online web contribution services, appropriate segregation of duties shall be in place to ensure that no single person is able to perform incompatible functions (custody, recording, approving).

## Deposits

**Policy:** The Chief Operations Officer, Executive Administrator/Assistant Executive Administrator or designee is responsible for making bank deposits. Deposits will be made within ten business days.

### Procedures:

- The Accounts Payable Department will restrictively endorse each check received (e.g. For Deposit Only YPI Charter Schools, Bert Corona Charter School, Monseñor Oscar Romero Charter School, or Bert Corona Charter High School).
- The Accounts Payable Department or designated site administrator will prepare a deposit packet itemizing the amount, source, and purpose of each check or cash payment received. The deposit packet will include a copy of each check and a bank deposit slip.
- The Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will review and approve the deposit packet.
- The Accounts Payable Department or designated site administrator will make the deposit and attach the deposit receipt to the deposit packet.
- The Accounts Payable Department will forward the deposit packet to ExED.
- ExED will reconcile the cash receipts to the deposit slip and the bank statement as part of the monthly close process.

## Expense & Accounts Payable

### Payroll

**Policy:** Employees are paid on a semi-monthly basis (15<sup>th</sup> and end of month). Under the supervision of the Executive Director, ExED will be responsible for processing payroll through a third-party provider.

### Time Sheet Preparation & Approval



**Policy:** All employees are required to record time worked, holidays, and leave taken for payroll, benefits tracking, and cost allocation purposes.

**Procedures:**

- Employees will be responsible for completing a timesheet, recording hours worked and vacation, sick or holiday time if applicable.
- Each employee will approve (verify) his/her timesheet via his/her signature or submission through the payroll system.
- Each supervisor will review and provide final approval of his/her employees' timesheets by signing each timesheet or approving each timesheet in the payroll system.
- Supervisors will return, either physically or via the payroll system, incomplete timesheets to the employee for revision.
- If an employee is unexpectedly absent and therefore prevented from working on the last day of the pay period or turning in his/her timesheet, the employee is responsible for notifying the signatory supervisor or for making other arrangements to submit the timesheet.
- Employees are responsible for requesting leave, and supervisors are responsible for tracking leave taken by salaried employees.

### **Payroll Additions, Deletions, and Changes**

**Policy:** The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator is authorized to approve all payroll changes within the scope of his/her budget authority.

**Procedures:**

- Chief Operations Officer or Coordinator of Accounts Payable will submit, either physically or electronically via payroll system, new hire or employee change paperwork to ExED prior to the payroll deadline.

### **Payroll Preparation & Approval**

**Policy:** ExED will prepare payroll in accordance with the organization's payroll calendar.

**Procedures:**

- Five days prior to each check date, the Executive Director or Chief Operations Office will:
  - Review electronic time cards within the payroll system to ensure that they are complete and approved for that pay period.
  - The ExED Accounting Analyst, Associate, or Senior Associate assigned to the organization will prepare payroll upon notification from the Executive Director or Chief Operations Officer that payroll for that pay period is approved.
  - Once processed, the payroll processor ExED Accounting Manager (AM) or Vice President (VP), School Finance will review the Payroll Review Report for accuracy and completeness and will review the Employee Change Report to verify the appropriateness of all changes.
  - The ExED Accounting Manager or Vice President, School Finance will submit payroll to the 3<sup>rd</sup> party payroll provider for check (if applicable) and direct deposit processing.

- The 3<sup>rd</sup> party payroll provider will deliver the payroll package to the organization address on file one day prior to the check date (if applicable).
- The Executive Director or Chief Operations Officer will be responsible for opening the payroll package, reviewing reports for accuracy, and notifying ExED of any missing check (if applicable).
- The Executive Director or Chief Operations Officer will distribute pay stubs to employees on the check date (if applicable).

### Pay Upon Termination

**Policy:** Employees who are discharged shall be paid all wages due at the time of termination. (Labor Code § 201) Employees who quit without giving prior notice shall be paid wages within 72 hours (inclusive of weekends and holidays). If the employee gives at least 72 hours' notice, the wages must be paid on the last day worked. (Labor Code § 202)

#### Procedures:

- The Executive Director or Chief Operations Officer will inform ExED of any involuntary termination immediately and will provide an accounting of the hours/days worked since the last payroll and any accrued Paid Time Off (PTO) to be paid.
- The Executive Director, Chief Operations Officer, or Coordinator of Human Resources will inform ExED of any voluntary termination immediately and will provide an accounting of the hours/days worked since the last payroll and any accrued Paid Time Off (PTO) to be paid.
- ExED will calculate the final check based on the hours/days worked and the employee's pay rate.
- ExED will prepare the final check and provide to the school in accordance with the timelines required by law. The organization is responsible for creating and obtaining the employee's signature on the final check acknowledgement.
- An employee who quits without 72 hours' notice may request that his or her final wage payment be mailed to a designated address. The date of mailing will be considered the date of payment. (Labor Code § 202)
- The final check may not be provided via direct deposit.
- The organization must provide ExED with a list of non-returning staff two weeks prior to the last day of instruction to ensure that final checks are distributed in accordance with labor law.

### Purchases & Procurement

**Policy:** All purchases must be authorized by the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator. Any expenditure in excess of \$10,000 for the purchase of a single item should have bids from three (3) suppliers if possible. Any food contract that exceeds \$150,000 (the small purchase threshold set by the US Department of Agriculture) shall follow a competitive bid process.

Goods or services purchased with federal funds must follow federal procurement guidelines as outlined in Education Department General Administration Regulations (EDGAR), Part 80— Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments, Sub-part C (Post Award Requirements), Section 80.36 (Procurement) located at: <http://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html>.

The Governing Board must approve any contract over \$50,000.

**Procedures:**

- All purchases over \$750 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.
- The Governing Board will review expenditures during each board meeting through the review of a check register that will list all checks written since the Governing Board's last meeting and will include the check #, check date, payee, and check amount.

**Contracts**

- The Executive Director or Chief Operations Officer , or Executive Administrator/Assistant Executive Administrator will consider in-house capabilities to accomplish services before contracting for them.
- The Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will keep and maintain a contract file evidencing the competitive bids obtained (if any were required) and the justification of need for any contract over \$10,000.
- The Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will confirm that the contractor is not listed in the US government's Suspended or Disbarred list via a search of the System for Award Management ([www.sam.gov](http://www.sam.gov)). The Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will keep a record of all searches.
- The Chief Operations Officer or Executive Administrator/Assistant Executive Administrator will ensure that a written contract clearly defining work to be performed is on file for all contract service providers (i.e. consultants, independent contractors, subcontractors).
- Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and workers' compensation insurance currently in effect. The Executive Director may also require that contract service providers list the school as an additional insured.
- The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator will approve proposed contracts and modifications in writing.
- Contract service providers will be paid in accordance with approved contracts as work is performed.
- The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator will be responsible for ensuring the terms of the contracts are fulfilled.
- Potential conflicts of interest will be disclosed upfront, and the Executive Director and/or Member(s) of the Governing Board with the conflict will excuse themselves from discussions and from voting on the contract.

## Credit Cards

**Policy:** Organization credit cards shall only be issued with the formal approval of the Governing Board and may only be used for organization-related expenditures.

**Procedures:**

- Purchase requisition and other documentation requirements apply to credit card purchases.
- The bank and/or consumer credit card (Amazon, Home Depot, Staples, etc.) will be kept under the supervision of the card holder.
- An itemized receipt should be turned in for all purchases.
- If receipts contain an inappropriate expense, the individual making the charge will be held responsible for payment.
- In the case of a missing receipt, a missing receipt form shall be submitted and approved by the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator.
- Should the Executive Director be required to complete a “missing receipt” form, authorization must be granted by a member of the Governing Board. Should the Chief Operations Officer be required to complete a “missing receipt” form, authorization must be granted by the Executive Director. Should an Executive Administrator/Assistant Executive Administrator be required to complete a “missing receipt” form, authorization must be granted by the Executive Director or Chief Operations Officer.
- Credit cards will bear the names of both the organization and the cardholder as authorized by the Governing Board.
- No personal charges are permitted.
- All reward points or discounts are property of the school. Use of such points or discounts is at the discretion of the Executive Director and should be used for the benefit of the organization.
- Upon termination, the employee shall immediately return the credit card and all receipts to the Executive Director or Chief Operations Officer.

## Debit Cards

**Policy:** Organization debit cards are not permitted.

**Procedures:**

If a debit card is automatically issued by the bank, the Executive Director or Chief Operations Officer will:

- Contact the bank to deactivate debit card service from the account.
- Destroy the physical debit card.

## Independent Contractors

**Policy:** The organization will comply with all applicable federal and state laws relative to the use of independent contractors.

**Procedures:**

- The Executive Director and the Chief Operations Officer have the authority to establish a contract with an independent contractor and are responsible for verifying that the person is

appropriately classified as an independent contractor and not as an employee and for obtaining a Form W-9.

- School employees may not serve as independent contractors.
- Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and workers' compensation insurance currently in effect. The Executive Director may also require that contract service providers list the school as an additional insured.
- All services performed by independent contractors will be processed as accounts payable.
- At the close of the calendar year, ExED will issue a Form 1099 to all independent contractors in accordance with IRS regulations.

## Invoice Approval & Processing

**Policy:** The Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator may approve all invoices within the scope of their respective budget authorities. The following procedures will be performed either manually or electronically.

### Procedures:

- The Accounts Payable Department will open and review invoices and bills and will notify the Executive Director, Chief Operations Officer of any unexpected or unauthorized expense.
- When receiving tangible goods from a vendor, the designated office staff at the school will trace the merchandise to the packing list and note any items that were not in the shipment.
- The Accounts Payable Department will code invoices to the correct budget line.
- Invoices are then routed to the Executive Director or Chief Operations Officer for payment approval.
- If the vendor is a sole proprietor or a partnership (including LP, and LLP) providing a service, the Accounts Payable Department will obtain a W-9 from the vendor prior to submitting any requests for payments to ExED.
- ExED will review the invoice for sufficient supporting documentation, verify the coding, and process payment.

## Cash Disbursements

**Policy:** Vendor payments will be issued upon receipt of appropriate documentation (e.g. vendor invoice, purchase order, packing slip, etc.).

**Procedures:** Two methods are used to issue vendor payments:

### Bank Check

- Once an invoice is approved by the Executive Director or Director of Operations for payment, the ExED Accounting Analyst will prepare an in-sequence check and will submit the check to the ExED AM or VP.
- The ExED AM or VP will review the supporting documentation for completeness and the check for accuracy and will sign the check with the Executive Director's facsimile signature stamp, which is maintained in a secured location when not in use.
- ExED will distribute the check as follows:

- Original – mailed or delivered to payee
  - Duplicate or voucher – saved electronically by an ExED accountant.
- Should a check need to be voided, “VOID” will be written in ink on the signature line of the check.

### **Nvoicepay/Corpay (outsourced payment provider)**

- Once an invoice is approved by the Executive Director or Chief Operations Officer for payment, the ExED Accounting Analyst will submit the invoice to Nvoicepay for payment. The ExED AM or VP will review the payments submitted to Nvoicepay and will approve or reject each vendor payment.
- After ExED AM or VP has approved a vendor payment, Nvoicepay will electronically withdraw funds from the organization’s bank account and transfer the funds to a Nvoicepay trust account. Each vendor payment will be a separate bank withdrawal and a separate line on the bank statement. Nvoicepay will then issue payments to the organization’s vendor. The payments are disbursed from Nvoicepay’s trust account via one of three payment methods: Check, ACH, or payment card. The payments will include a Reference ID that ExED will record as the transaction number in ExED’s accounting system. The Reference ID will not be in sequence as it is based on Nvoicepay’s numbering system.
- Nvoicepay will save an electronic check copy for any paper checks issued and Nvoicepay will save vendor remittances for any ACH or payment card payments issued.
- Nvoicepay will stale date payments after 60 days. When this situation happens, Nvoicepay will void the payment and credit the funds back to the organization's bank account. ExED may also direct Nvoicepay to reissue a payment prior to the 60-day deadline. In this case, Nvoicepay will void the original payment and issue a new payment. The new payment will be recorded as a payment modification and will be linked to the original payment in Nvoicepay. The new payment will have a new Reference ID for tracking purposes, however, the new Reference ID will not be updated in ExED’s accounting system where the original Reference ID is recorded as the new transaction is only impacting Nvoicepay’s account.

## **Petty Cash**

**Policy:** The Executive Administrator/Assistant Executive Administrator will keep a petty cash box not to exceed \$500. Petty cash will be kept in a lockbox that is stored in a secure location. Access to the cash box should be limited to authorized personnel. Petty cash shall only be used for reasonable and allowable school purposes (No personal use).

### **Procedures:**

- The Executive Administrator/Assistant Executive Administrator will manage the petty cash fund.
- The Executive Administrator/Assistant Executive Administrator will maintain a log of all disbursements made from the petty cash fund and will use a petty cash slip for all disbursements. The petty cash slip must be signed by the Executive Administrator/Assistant Executive Administrator and the petty cash recipient.

- Within 48 hours of the petty cash withdrawal, the petty cash recipient will submit an original receipt to the Executive Administrator/Assistant Executive Administrator who will attach the receipt to the petty cash slip and store in the petty cash box.
- At all times the petty cash box must contain receipts, petty cash slips, and cash totaling \$500.
- When the petty cash balance is low the Executive Administrator/Assistant Executive Administrator will prepare a petty cash reimbursement form, totaling all the petty cash disbursements and attaching the original petty cash slips and receipts to the form. The Executive Director or Chief Financial Officer will review and approve the petty cash reimbursement form and supporting documentation.
- The Accounts Payable Department will forward the petty cash reimbursement form and original supporting documentation to ExED.
- The ExED Accounting Analyst will record the petty cash disbursements in the general ledger and issue a check made payable to the Program Coordinator in the amount of the total petty cash disbursement.
- It is the Executive Administrator's/Assistant Executive Administrator's responsibility to cash the check and to keep track of funds in the box. Reconciliation must occur when funds are replenished, and/or at a minimum, annually.
- ExED will conduct surprise counts of the petty cash fund.
- Loans will not be made from the petty cash fund.

## Employee and Volunteer Expense Reimbursements

**Policy:** The organization will reimburse pre-authorized school-related expenses that are accompanied by an original receipt or other appropriate documentation. Only the Executive Director, or Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator may incur school-related expenses without pre-approval. Items purchased without pre-approval are not guaranteed to be reimbursed.

### Procedures:

- An employee or school volunteer seeking to make a school-related purchase must obtain verbal or written pre-approval from the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator.
- The organization reserves the right to refuse reimbursement for any inappropriate expenses made. (Items purchased without pre-approval are not guaranteed to be reimbursed.)
- Employees will submit signed expense reports monthly, as necessary, to the Chief Operations Officer or Executive Administrator/Assistant Executive Administrator for approval. Original receipts or other appropriate documentation (e.g. email receipt) must be attached to the expense report.
- All expense reports must be submitted within the fiscal year in which the expense is incurred.
- Executive Administrator/Assistant Executive Administrator expense reports must be approved by the Executive Director or Chief Operations Officer.
- Chief Operations Officer expense reports must be approved by the Executive Director.
- Executive Director expense reports must be approved by a member of the board.
- The Accounts Payable Department will submit the approved expense report and supporting documentation to ExED.



- ExED will issue a reimbursement check within 15 business days of receipt of appropriate and complete documentation.

### Travel Expenses

**Policy:** The Executive Director must pre-approve all school related travel. Mileage will be reimbursed at the organization-approved mileage rate, not to exceed the current IRS reimbursement rate.

#### Procedures:

- For the purposes of mileage reimbursement, where a trip is commenced or terminated at the employee's home, the distance traveled shall be reduced by the employee's home-to-office commute distance.
- Employees will be reimbursed for overnight stays at hotels/motels when pre-approved by an administrator and the event is more than 50 miles from either the employee's residence or the school site. Hotel rates will be negotiated at the lowest level possible, including the corporate, nonprofit or government rate if offered, and the lowest rate available.
- Transportation expenses such as airfare will be purchased at the lowest rate available.
- A per diem will be provided at the per diem rate found at ([http://www.gsa.gov/portal/category/100120-US Government Rates](http://www.gsa.gov/portal/category/100120-US%20Government%20Rates)) for any breakfast, lunch, dinner, or incidental expense for items not included in the fee for the event. Employees will be responsible for any excess expenses beyond the established per diem rate. Employees should utilize bus/shuttle service whenever possible. When traveling in groups, taxis may be more economical. Employees should choose between long-term parking or a taxi based on whichever is the more economical for the organization. Reimbursements will be provided for ground transportation travel expenses directly related to the event, not including transportation from home to airport.
- After the trip, the employee must enter all of the appropriate information on an expense report, attach original receipts, and submit it to the Chief Operations Officer or Executive Administrator/Assistant Executive Administrator for approval and then on to ExED for processing.

### Governing Board Expenses

- The individual incurring authorized expenses while carrying out the duties of the school will complete and sign an expense report and attach original receipts.
- The Executive Director and/or another board member will approve and sign the expense report, and submit it to ExED for payment.

## Asset Management

### Cash Management and Investments

**Policy:** All funds will be maintained in high quality financial institution or invested with the following objectives in order of priority; preservation and safety of principal, liquidity, and yield.

#### Procedures:



- The Executive Director will obtain Governing Board approval before opening or closing a bank account.
- Governing Board will adopt an investment policy before funds are to be invested.

## Capital Equipment

**Policy:** The organization capitalizes any item, purchased or donated, with a value of \$1,000 or more and with a useful life of more than one year.

### Procedures:

- ExED will maintain a ledger of all capitalized items. The ledger will include the original purchase price and date and a brief description of the asset.
- The organization will take a physical inventory of all assets within 90 days of the end of each fiscal year, indicating the condition and location of the asset.
- The Executive Director and Chief Operations Officer will be notified of all cases of theft, loss, damage or destruction of assets.
- The Chief Operations Officer or Director of Technology will submit to ExED written notification of plans for disposing of assets with a clear and complete description of the asset and the date of the disposal.

## Loans

**Policy:** The Governing Board will approve all loans from third parties. In the case of a long-term loan, approval may also be required from the chartering authority in accordance with the terms of the charter and/or other lenders in accordance with the loan documents. Employee loans, including salary advances, are not allowed.

### Procedures:

- The Executive Director and/or Governing Board designee shall review and sign the promissory note before funds are borrowed.
- Loan agreements should specify all applicable terms, including the purpose of the loan, the interest rate, and the repayment schedule.
- Loan covenants and reporting requirements are to be acknowledged by the board at the time of adoption.

## Insurance

**Policy:** The organization will maintain insurance with a high quality insurance agency at all times for:

- General Liability
- Property
- Workers' Compensation
- Professional Liability
- Directors' and Officers' Coverage

Umbrella and student accident policies are considered prudent add-ons.

### Procedures:

- The Executive Director will carefully review insurance policies with the Broker on an annual basis prior to renewal to determine compliance with Charter authorizer and any applicable loan covenant requirements.
- The Chief Operations Officer will forward to ExED all insurance policies and related documents (e.g. certificates of insurance, claim forms, etc.).

## Parking Lot Liability

**Policy:** Parking lot related incidences are not covered under any school insurance policy. The organization assumes no liability for damage to cars unless a student is observed by an adult accidentally causing damage to a vehicle while engaged in a school activity.

### Procedures:

- If a student willfully causes damage the student's parent or guardian is responsible.
- If a parent or other visitor causes damage, that individual is responsible.
- If an employee causes damage, the employee is responsible.
- If an unknown person causes damage and there is no witness, the affected individual would determine if he/she has applicable coverage through his/her individual insurance policies.

## Operating Reserves

**Policy:** The organization will ensure adequate cash balances to meet annual cash flow needs. The target minimum operating reserve fund is recommended to be equal to:

- the greater of 5% or \$55,000 for a school with 0-300 ADA
- the greater of 4% or \$55,000 for a school with 301-1,000 ADA

The amount of Operating Reserves will be calculated each year after approval of the annual budget and included in monthly financial reports.

### Procedures:

- ExED will monitor the organization's reserve level and will report the reserve level to the Executive Director and the Governing Board on a monthly basis.
- It is the responsibility of the Executive Director and the Governing Board to understand the organization's cash situation and it is the responsibility of the Executive Director to prioritize payments as necessary to manage cash flow.
- The Governing Board may restrict a portion of the operating reserve fund for strategic goals.
- The Governing Board may develop an additional Operating Reserve Policy to specify use of the Operating Reserves.



**MONSEÑOR  
OSCAR  
ROMERO**  
CHARTER SCHOOL

## ENGLISH LEARNER PLAN (EL)

### MISSION

The mission of **Monseñor Oscar Romero Charter** 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.
- Enable students to become life-long learners.

Students at **Monseñor Oscar Romero Charter** 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.

In accordance with the Schoolwide Learner Outcomes (SLO), every student who graduates from **Monseñor Oscar Romero Charter** will be:

- An **Effective Communicator**, able to read, write, converse and listen for a variety of purposes
- An **Information Manager**, able to locate, access, organize, evaluate and apply information in a complex and technological world
- A **Problem Solver**, able to apply a variety of thinking, creative and computing skills to produce solutions for practical and theoretical problems
- A **Productive Member of Society**, able to demonstrate healthy, responsible behavior and to work collaboratively and respectfully in a culturally diverse community
- A **Lifelong Learner**, able to set educational and career goals, to develop a realistic strategy to achieve those goals and to apply content knowledge and critical thinking skills to adapt to a rapidly changing environment

### **School Year 2022-2023 (Revised)**

## Contents

MISSION .....	1
Introduction .....	4
<u><a href="#">Principle One: Assets-Oriented and Needs-Responsive Schools</a></u> .....	4
<u><a href="#">Principle Two: Intellectual Quality of Instruction and Meaningful Access</a></u> .....	4
<u><a href="#">Principle Three: System Conditions that Support Effectiveness</a></u> .....	4
<u><a href="#">Principle Four: Alignment and Articulation Within and Across Systems</a></u> .....	4
English Learners Vision Statement .....	11
Goals For English Learners Program.....	11
Essential Elements for English Learner Programs .....	13
Learning Environment .....	14
Curriculum.....	15
Pedagogy .....	15
Instructional Resource .....	15
I. English Language Arts.....	15
Family and Community Engagement .....	17
Staffing and Professional Development .....	17
Record Keeping .....	18
Initial Identification .....	18
Home Language Survey .....	19
Primary Language Proficiency Assessment .....	21
Parental Notification .....	21
Maintenance of Records .....	21
FLOW CHART – Figure 1 .....	22
Assessment for Initial identification and Program Placement .....	22
Parental Involvement .....	23
Instructional Programs .....	24

Instructional Programs ..... 24

Elements of Program Options ..... 25

    English Learners Program Settings\* - ..... 25

Key Features of SDAIE ..... 26

    Stage 1: Implementing an English Mainstream Service Option ..... 33

    Stage 2: Follow-up and Monitor Progress ..... 33

    Feedback ..... 34

Local Educational Plan (LEA) Component Performance Goal 2..... 45

## Introduction

Included in this revised English Language Learners Performance and Improvement Plan is the use of the following supporting two main legislations addressing the needs of English Learners. In July 2017, the California State of Education adopted a historic new English learner education policy, the English Learner Roadmap. This policy recognizing English learners as a system-wide responsibility, recognizing a need to provide EL students with rich and challenging curriculum from early childhood to grade 12, and respects the value of English learner's primary language and culture. On July 1, 2018 the California Department of Education regulations for implementing Prop. 58 to establish programs for English Learners that promote proficiency in multiple languages and leverage students' home language as an asset, the following principles as outline at [cde.ca.gov](http://cde.ca.gov):

- **Principle One: Assets-Oriented and Needs-Responsive Schools**

*Pre-schools and schools are responsive to different English learner (EL) strengths, needs, and identities and support the socio-emotional health and development of English learners. Programs value and build upon the cultural and linguistic assets students bring to their education in safe and affirming school climates. Educators value and build strong family, community, and school partnerships.*

- **Principle Two: Intellectual Quality of Instruction and Meaningful Access**

*English learners engage in intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency. These experiences integrate language development, literacy, and content learning as well as provide access for comprehension and participation through native language instruction and scaffolding. English learners have meaningful access to a full standards-based and relevant curriculum and the opportunity to develop proficiency in English and other languages.*

- **Principle Three: System Conditions that Support Effectiveness**

*Each level of the school system (state, county, district, school, pre-school) has leaders and educators who are knowledgeable of and responsive to the strengths and needs of English learners and their communities and who utilize valid assessment and other data systems that inform instruction and continuous improvement. Each level of the system provides resources and tiered support to ensure strong programs and build the capacity of teachers and staff to leverage the strengths and meet the needs of English learners.*

- **Principle Four: Alignment and Articulation Within and Across Systems**

*English learners experience a coherent, articulated, and aligned set of practices and pathways across grade levels and educational segments, beginning with a strong foundation in early childhood and appropriate identification of strengths and needs, and continuing through to reclassification, graduation, higher education, and career opportunities. These pathways foster the skills, language(s), literacy, and knowledge*

*students need for college- and career-readiness and participation in a global, diverse, multilingual, twenty-first century world.*

This document builds on our core beliefs. First, students' learning and achievement are at the center of all our policy decisions and are the focus of the English Learner Master Plan. Families are critical partners in the privilege and responsibility of ensuring that all multilingual students become proficient in English and master the academic content required of every student in California. English learners face the dual tasks of learning rigorous academic subject matter while simultaneously mastering a new language.

**Monseñor Oscar Romero Charter** incorporate an English Language Development (ELD) program that will target students who are struggling with the development of their English language skills that will include:

- Ongoing measurement of each English Learner student's progress toward English language proficiency, through the use of ELD portfolios.
- Use of Success For All to assist ELL students.
- Ongoing professional development in the area of sheltered instruction for all subject area teachers, primarily using the SIOP model.
  - o Opportunities for ELD level 1 and 2 students to receive additional accelerated instructional support after school.
- Use of Ellevation Platform, which provides district administration, school leaders, and classroom teachers with targeted data analytics to support English Learners and digital workflow tools for our EL program. With a platform focused solely on English Learners, our administrators and teachers will be able to monitor, intervene, collaborate, and report on the academic and language success of our ELs. Ellevation will enable all of our Long Term English Learners and Reclassified Fluent English Proficient students to be qualitatively and quantitatively monitored at both the site and district level. It will also streamline our reclassification and parent letter process to be more user-friendly and inclusive to our EL teams and families.

Ellevation Strategies includes research-based instructional strategies for classroom teachers to help them meet the needs of our current and former English Learners, as well as DLI students. Strategies are an easy-to-use tool that allows teachers of any grade or subject area to easily integrate language activities into existing lesson plans and curriculum. Embedded within each activity are data-driven differentiation ideas and student groupings. By providing purposeful opportunities throughout a lesson for students to read, write, listen, and speak, Ellevation Strategies ensures students build language proficiency and access rigorous grade-level content at the same time. Ellevation Strategies includes Professional Learning Modules, which cover a range of topics specific to subgroups, such as newcomers and LTELs, and relevant to language practices such as fostering interactions and building background.

Ellevation Math is an online learning program designed specifically for English Learners in grades 3 - 9, though benefitting all students. It pre-teaches academic vocabulary in context and offers comprehensible input so that students can better understand instruction and participate more

meaningfully in class. With Ellevation Math, ELs arrive at math class ready to engage, solve problems, and explain their thinking while utilizing new vocabulary. When ELs are better able to engage in class discussions and skill-building, they are more likely to reach benchmarks, gain confidence, and overcome barriers to advanced academic opportunities.

Prior to utilizing the Toolkit, **MORCS'** teachers and staff review the content of the [English Language Arts/English Language Development Framework for California Public Schools \(2015\)](#) and the [California English Language Development Standards: Kindergarten Through Grade 12 \(2014\)](#).

The *English Learner Toolkit of Strategies* (ELTS) is designed to support implementation of the historic California English Learner Roadmap policy (CA State Board of Education, 2017). The vision of the EL Roadmap proposes “English learners fully and meaningfully access and participate in a twenty-first century education...that results in their attaining high levels of English proficiency, mastery of grade level standards, and opportunities to develop proficiency in multiple languages” (*EL Roadmap*, p. 1). Educators who selectively and intentionally employ the strategies within the ELTS are well-positioned for differentiated instruction, as outlined in EL Roadmap Principle One: Assets-Oriented and Needs-Responsive Schools, Element B, “Recognizing that there is no single EL profile and no one-size-fits-all approach that works for all English learners, programs, curriculum, and instruction must be responsive to different EL student characteristics and experiences” (*EL Roadmap*, p. 13). Moreover, the Toolkit explicitly addresses the need to engage ELs in “intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency” as called for by EL Roadmap Principle Two: Intellectual Quality of Instruction and Meaningful Access (*EL Roadmap*, p. 14). Across the ELTS the user will note connections to Principle Two’s Element A (integrated and designated ELD), Element B (rigorous, intellectually rich, standards-based curriculum), Element C (engagement, interaction, and high expectations), and Element D (access to the full curriculum with appropriate supports), as outlined in the Roadmap policy (p. 16). When used as intended, the ELTS can serve as a vehicle for classrooms aiming to bring the vision of the CA EL Roadmap to life.

The use of the English Learner Roadmap Priorities and the resources of the Toolkit are designed to provide K-12 classroom teachers, coaches and teachers on special assignments high leverage strategies to increase the English language proficiency of their English learners; the toolkit is designed to be used in both Integrated and Designated English Language Development. The strategies address reading, writing, speaking and listening to prepare ELs for literacy in the 21st century.

Title III funding from the federal government to help English learners to speak, read, and write in English and to achieve in reading and mathematics. **Monseñor Oscar Romero Charter** will receive Title III funds that are reviewed each year, as required under every Student Succeeds Act, to see if they meet the three Annual Measurable Achievement Objectives (AMAOs) for our English learners:



Table AMO'S and Measurable Goals

AMAO's	Measurable Goals
<p>Progress in learning English</p> <ul style="list-style-type: none"> <li>• Increase one proficiency level</li> <li>• Early Advanced and Advanced must reach English Proficient level bringing all skills to Intermediate Level.</li> <li>• English Proficient levels are expected to maintain that level.</li> </ul>	<ul style="list-style-type: none"> <li>• Administer the ELPAC to ascertain the level of proficiency.</li> <li>• Conduct analysis of EL's using ELSSA.</li> <li>• Identify factors that contribute to meeting or not meeting AMAO's.</li> <li>• Use <b>Monseñor Oscar Romero Charter</b> English Learner Plan of Action-will be visited yearly and/or on an ongoing basis.</li> <li>• Work with teachers, parents and staff to provide services.</li> </ul>
<ul style="list-style-type: none"> <li>• Progress in the percentage of students who become proficient in English</li> </ul>	<ul style="list-style-type: none"> <li>• Increase English Learner redesignation ratio yearly. Continue to Monitor students who have been redesignated and work with students at each level.</li> </ul>
<ul style="list-style-type: none"> <li>• Academic targets in English- language arts and mathematics growth-</li> <li>• Participation Rate</li> <li>• Percentage Proficient or Above</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor and assist that EL meet academic targets in English Language Arts and Mathematics (Increasing yearly)</li> </ul>

Holding quarterly meetings with parents to discuss each student's progress toward English language proficiency.

ELAC provides leadership for our EL students.

English Learners will achieve and sustain high levels of academic, linguistic and cultural competency. The goals are:

- The *English Learner Master Plan* program has been developed and is fully implemented.
- **ALL** English Learners will master the English language as measured by ELPAC, Smarter Balanced results and other measures.
- **ALL** English Learners will achieve academic success.
- There will be a substantial increase and optimization of EL and RFEP participation in GATE, and other classes. ELs and RFEPs will have representation in success with college entrance exams and enrollments in colleges and universities consistent with their size of the entire student enrollment.
- ELs and RFEPs will continue traditions of responsibility and positive relationships within their families and home community and will be prepared to develop the ability to live and work productively in various cultural settings throughout the wider society.

- ELs and English Only students enrolled in programs where they will master listening, speaking, reading, and writing in Spanish as well as English.

Parents of ELs and RFEPs will be engaged and represented in their children's education consistent with the proportion of the students enrolled.

English Learners will develop the skills necessary to be successful citizens. These skills include:

- Academic preparation
- Information literacy
- Fluency in technology
- Cross-Cultural sensitivity
- Interpersonal communication
- Community and civic participation
- Social and environmental responsibility.

## **LEARNING ENVIRONMENT**

English Learners at **Monseñor Oscar Romero Charter** will be provided a safe, non-threatening and affirming learning environment in which it is the norm for them to:

- Interact, collaborate, communicate, and negotiate with their peers.
- Experience an education that is rich and challenging, which will prepare the student to be college and career ready.
- Use and fully develop their language and culture.
- Have their voices heard and reflected throughout the school community.

Share equitably in the allocation of access and resources.

## **PEDAGOGY**

English Learners will have access to culturally and linguistically responsive teaching strategies that are focused on their experiences, interests, and needs. This includes:

- Complex, hands-on learning experiences.
- Opportunities for active processing, deep and critical thinking, and reflection.
- Connections between new and prior knowledge.
- Examining issues of social justice, which have daily impact on students' families and their communities. In the event a student enters **Monseñor Oscar Romero Charter** without records and/or prior assessment and there is a family request or an apparent need for English language enrichment, a Home Language Survey will be completed. If language other than English is indicated on the survey, appropriate testing and ELD CELDT/ELPAC, Smarter Balanced and other assessments will be utilized to maximize the student's capacity for English language acquisition.

We acknowledge that English learners face enormous challenges, yet they also bring vital linguistic and cultural assets to our community. At **Monseñor Oscar Romero Charter** we value and promote 21<sup>st</sup> Century college and career ready knowledge and skills, as well as multilingual and multicultural proficiencies that provide real advantages to our students in today's complex, interconnected world. We strive to achieve these academic and linguistic goals by implementing the highest quality, evidence-based programs and services for these students. While the plan describes procedures and systems that are required by state and federal law, this plan describes what is to occur in the classroom. We promote culturally responsive teaching that acknowledges the strong cultural heritages of all ethnic and linguistic members that live in Los Angeles.

Our goal is to build on that rich heritage and expand upon it to ensure that our students have the tools they need to achieve their dreams. A teacher handbook is included with this document that describes some of the research-based practices that **Monseñor Oscar Romero Charter** endorses and expects to see these strategies used in classrooms. Professional development efforts will be focused around the use and implementation of California Common Core State Standards for English Language Development strategies.

The mastery of standard, academic English is an issue of access, equity, and social justice. The **Monseñor Oscar Romero Charter** believes that a student's education should not be determined by his or her race, ethnicity, linguistic background, or socioeconomic status. We acknowledge the role that each of our individual characteristics plays in making our students who they are, and in our language learners; whether we are learning a new language, new vocabulary related to a program of study or a job, or different registers of speech in varied social settings. We are all continually learning to use language. Therefore, all teachers are teachers of language. With California's adoption of the Common Core State Standards, and their emphasis on academic language and literacy across the disciplines using the English Language Development component will further support our students in the acquisition of English.

**Monseñor Oscar Romero Charter** further supports and provides language enrichment through the use of the Success for All as we build students' mastery of standard, academic English and academic content proficiency. In this plan, we endorse teaching practices and strategies that respect, affirm, and build upon the language and culture of each child.

The **English Learners Plan** was developed to successfully provide educational services to our English Learners by addressing the following eight components:

1. Goals for English Learners
2. Initial Student Identification
3. Instructional Programs
4. Placement of Students and Reclassification Process
5. Evaluation, Monitoring and Accountability
6. Staffing and Professional Development
7. Parent Advisory Committees
8. Funding

This comprehensive **English Learners (EL) Plan** is premised on the ideal of equal educational opportunities for ALL students; it provides a comprehensive delivery system that will meet the needs of our English Learner students by:

- a) Providing a framework of the English Learners Program.
- b) Providing identification and assessment of appropriate instructional placement.
- c) Providing staff training programs; which will enhance bilingual competencies of personnel.
- d) Providing a balanced curriculum to ensure preparation and ongoing guidance to our students.
- e) Providing a method and criteria for selections, development, evaluation, and adoption of curriculum materials.
- f) Providing in-service training to develop and improve instructional strategies.
- g) Insuring the participation of staff, parents, students, and community members in the planning and implementation of the programs for our English Learners students.
- h) Determining and providing administrative leadership and fiscal needs to actualize the *English Learners Plan*.
- i) Providing periodic and ongoing evaluations of the instructional programs.
- j) Ensuring that the evaluation of resources is supplemental and distributed equally through all schools.

This *EL Plan* is the structure and foundation for an effective and successful instructional program for our EL students. The plan will be monitored and evaluated for necessary modifications to best meet the needs of our students on an ongoing process.

**All Monseñor Oscar Romero Charter** personnel, teachers, staff, and administrators-are expected to follow the procedures specified in this *EL Master Plan*. Staff members who find ways to improve on these practices are encouraged to bring any proposed modifications to the attention of the Executive Administrator, for written approval to ensure that any such modifications meet the standards set by our governing board and are consistent with state and federal law. **All** responsible personnel of **Monseñor Oscar Romero Charter** are to fully implement this *EL Master Plan*; failure to do so will be reflected in the employees' evaluation.

The major goals for English learners are to develop proficiency in English and in the school's core curriculum as rapidly and as effectively as possible in an established English-language classroom. English learners are reclassified as fluent English proficient after meeting established criteria to ensure these students have overcome language barriers, have recouped any academic deficits incurred in other areas of the curriculum, and can demonstrate English-language proficiency comparable to that of the school's average native English-language speakers.

## English Learners Vision Statement

*We believe in the potential of our students.*

*We believe **ALL** students must have equal access to a high quality education.*

*We believe and acknowledge that English Learner (EL) students have a rich language and cultural background that provides a strong foundation for learning.*

*We hold that knowledge is not language-based.*

*We acknowledge that academic proficiency in the English Language is necessary for educational and professional success.*

Based on these beliefs, **Monseñor Oscar Romero Charter** addresses the needs of its EL students, grades 6<sup>th</sup> through 8<sup>th</sup> through a comprehensive educational plan, which incorporates the acquisition of the English language while providing the option of increasing academic proficiency in the students' primary language and preserving their cultural heritage.

### Components of the Vision

1. English is a vehicle for access to education. Not being able to speak the language used in schools for instruction is, therefore, a barrier to an education and limits the potential of students in **Monseñor Oscar Romero Charter**.
2. A child's primary language is part of his or her identity. Learning to speak and write in one's home language, having that language incorporated into one's education, and making the choice about how and when one uses it are basic human rights. To ask children not to use their home language or adopt a new language is the same as asking them to deny their identity or to take on a new one.
3. Language resources. A child's home language is a resource to be conserved, protected, and developed. **ALL** EL students should have the option to become fully bilingual and bi-literate.

As we create an excellent English Learner Program for our students, it is important that our school community embraces the following:

- Builds an understanding about the needs of English Learners and about the impact of language and culture on education.
- Provides the leadership, builds the will, and create the attitudes to better enable educators to welcome and embrace English Learners.
- Creates the structures that support academic success for English Learners.
- Builds the capacity to deliver programs that address the specific needs of our English Learners.
- Implements an accountability model that ensures the success of English Learners in our schools.

### Goals For English Learners Program

**Monseñor Oscar Romero Charter** will incorporate an ELD program that is aligned with the California Common Core State Standards-English Language Development that will target students who are developing their English language skills that will include:

- Ongoing measurement of each EL student’s progress toward English language proficiency, through the use of ELD portfolios.
- Use of Explicit Direct Instruction, small group instruction, and small group tutoring throughout the day to assist EL students.
- Ongoing professional development in the area of sheltered instruction and Specially designed academic instruction in English (SDAIE) for all subject area teachers, primarily using the Sheltered Instructional Observation Protocol (SIOP) model.
- Opportunities for ELD level 1 and 2 students to receive additional instructional support during the Success For All Reading Block with the Rosetta Stone Program.

English Learners will achieve and sustain high levels of academic, linguistic and cultural competency. The goals are:

- The **Monseñor Oscar Romero Charter** *English Learner Master Plan* programs will be developed and fully implemented.
- **ALL** English Learners will master the English language as efficiently and effectively as possible.
- **ALL** English Learners will achieve academic success.
- There will be a substantial increase and optimization of EL and RFEP participation in gifted and talented programming, and other programs such as Helping Young People Excel (HYPE). HYPE provides our students with the guidance and resources to qualify for admission at elite college-prep independent high schools and for Advance Placement programs in public schools. HYPE provides a blend of intense programming and services to help students’ access and succeed in high school and beyond. ELs and RFEPs will have representation in success with college entrance exams and enrollments in colleges and universities consistent with their size of the entire student enrollment.
- ELs and RFEPs will continue traditions of responsibility and positive relationships within their families and home community and will be prepared develop the ability to live and work productively in various cultural settings throughout the wider society.
- ELs and English Only students enrolled in programs where they will master listening, speaking, reading, and writing in Spanish as well as English.
- Parents of ELs and RFEPs will be engaged and represented in their children’s education consistent with the proportion of the students enrolled.

English Learners will develop the skills necessary to be successful citizens. These skills include:

- Academic preparation
- Information literacy
- Fluency in technology

- Cross-Cultural sensitivity
- Interpersonal communication
- Community and civic participation
- Social and environmental responsibility.

### **Essential Elements for English Learner Programs**

The enrollment process begins when a parent or guardian takes their child to **Monseñor Oscar Romero Charter** and completes the enrollment packet. A key component of the enrollment process is the Home Language Survey (HLS). The HLS is a questionnaire used to determine the student's primary language and whether the student will be required to take an assessment for English language proficiency. The results of the English language proficiency assessment will determine the appropriate instructional services a student will need to meet their full academic potential.

- California *Education Code* (EC), Section 52164.1 (a) contains legal requirements which direct schools to determine the language(s) spoken in the home of each student. Please see the [California Department of Education website](#) for more information.

The HLS consists of the following four questions:

- What language did the student learn when he or she first began to talk?
- What language does this student most frequently use at home?
- What language do you use most frequently to speak to this student?
- Which language is most often used by the adults at home?

A home language determination is required only once. The information provided by the parent/guardian on the initial HLS takes precedence over any information provided on subsequent surveys. Parents/guardians are to receive an explanation regarding the purpose of the HLS, as well as the possibility that their child may be given an assessment to determine their level of English language proficiency. The explanation should be given:

- Orally during enrollment
- During an initial consultation on programs for ELs
- Through the initial parent/guardian notification letter Schools should reassure parents/guardians that the HLS is used solely to offer appropriate educational services, not for determining legal status or for immigration purposes.

### **Amending the Home Language Survey**



The parent/guardian has the right to amend the HLS at any time. However, any changes to the HLS will need to be made by the parent/guardian prior to the ELPAC Summative Assessment window. If the parent/guardian amends the HLS prior to ELPAC Summative administration, the school must honor the changes made while continuing to take reasonable doubt into consideration. If there is no reasonable doubt as to the student's English language proficiency, the school must initiate the Language Classification Correction process.

### **Parent/Guardian Notification Requirements**

Research shows that strong family-school relationships are an indicator of student success.<sup>2</sup> Schools have an obligation to ensure meaningful communication with parents/guardians in a language they can understand and to adequately notify parents/guardians of information about language instructional programs and services. When 15 percent or more of the student population speaks a single primary language other than English, as determined from the preceding year's Census data submitted to the Department of Education, the school is required to send all correspondence to parents/guardians in English and the primary language (California EC 48985).

Title I [*Elementary and Secondary Elementary Act*, Section 1112 (g)(1)(A)] requires schools to inform parents/guardians of initially identified ELs within 30 days after the beginning of the school year/track (or, if during the school year, within two weeks of the child being placed in a program).

After the student completes the initial English language proficiency assessment, parents/guardians must receive in a timely manner information about the student's

English Language Proficiency (ELP), instructional program options, and of their right to opt out of an EL instructional program. Translating this information into the family's home language is critical, and if a written translation is not provided, an oral interpretation should be made available whenever needed.

In order to create the necessary conditions for English Learners to achieve at higher levels **Monseñor Oscar Romero Charter** will implement the following essential elements.

### **Learning Environment**

English Learners at **Monseñor Oscar Romero Charter** will be provided a safe, non-threatening and affirming learning environment in which it is the norm for them to:

- Interact, collaborate, communicate, and negotiate with their peers.
- Experience an education that is rich and challenging, which will prepare the student to be college and career ready.
- Use and fully develop their language and culture.
- Have their voices heard and reflected throughout the school community.
- Share equitably in the allocation of access and resources.



## Curriculum

English Learners will have access to a challenging, well-articulated curriculum, which builds bilingualism and bi-literacy. This curriculum will be:

- Based on and aligned to the California Common Core State Standards, English Language Development, California Department of Education State and **Monseñor Oscar Romero Charter** standards.
- Rigorous, meaningful, purposeful, interesting, and rich.
- Student-centered and student-friendly.
- Multicultural
- Designed to provide authentic and ongoing reflection

## Pedagogy

English Learners will have access to culturally and linguistically responsive teaching strategies that are focused on their experiences, interests, and needs. This includes:

- Complex, hands-on learning experiences.
- Opportunities for active processing, deep and critical thinking, and reflection.
- Connections between new and prior knowledge.
- Examining issues of social justice, which have daily impact on students' families and their communities.

## Instructional Resource

### I. English Language Arts

The CA Common Core State Standards was updated as stated in the Department of Education Publications Senate Bill 1200, Statutes of 2012 and provided an update for: English Language Arts and Literacy in History/ Social Studies, Science and Technical Subjects (CA CCSS for ELA/Literacy). The CA CCSS for ELA/Literacy were modified on March 13, 2013, following the recommendation of State Superintendent of Public Instruction Tom Torlakson, to include the addition of the College and Career Readiness Anchor Standards and technical changes.

The English Language Arts courses will prepare students for thoughtful study by conveying the importance of being active thinkers during reading and writing exercises. In the area of curriculum development and language arts instruction for grades 6<sup>th</sup>-8<sup>th</sup>, **Monseñor Oscar Romero Charter** will:

- Develop and or adopt an English Language Arts curriculum that incorporates the grade-level curriculum content specified in the Common Core State Standard. (CCSS Appendices)
- Integrate reading, writing, speaking, and listening to form a greater understanding of history-social science, mathematics, and science.

- Develop important “habits of mind” in the form of evidence, connections and patterns, supposition, and meaning that will produce active and thoughtful writers, poets, researchers, and speakers.
- Teach students to read with ease, fluency, and enjoyment.
- Expose students to multicultural fiction, non-fiction, poetry, essays, and scripts.
- Teach students to write with clarity, expression, and purpose.
- Coach students to deliver and critique oral presentations effectively.
- Engage students to reflect upon ways literature and writing impact their lives through authentic writing and multicultural literature selections.
- Integrate appropriate technology and technological analysis into the study of English-Language Arts.
- Adopt and implement Common Core State Standards.

As stated the CA ELD Standards, which emphasize that ELs at all, English language proficiency levels are engaged in the type of rich instruction called for in the CA CCSS for ELA/Literacy, with appropriate scaffolding that attends to their particular language learning needs. The goal of the CA ELD Standards is that at each grade level or span, is to ensure that ELs are fully supported as they read, analyze, interpret, and create a variety of literary and informational text types;

- Develop an understanding of how language is a complex, dynamic, and social resource for making meaning;
- Develop an understanding of how content is organized in different text types across disciplines using text organization and structure, language features, and vocabulary depending on purpose and audience;
- Become aware that different languages and varieties of English exist;
- Recognize their home languages and cultures as resources to value in their own right and to draw upon in order to build proficiency in English;
- Contribute actively to class and group discussions by asking questions, responding appropriately, and providing useful feedback;
- Demonstrate knowledge of content through oral presentations, writing, collaborative conversations, and multimedia; and Develop proficiency in shifting registers based on task, purpose, audience, and text type.
- This framework for implementation of the CA CCSS for ELA/Literacy and CA ELD Standards is a critical and essential contribution toward achieving this goal.

### Guiding Principles

The following guiding principles and beliefs informed the development of the framework:

- Schooling should help all students achieve their highest potential.
  - The responsibility for learners’ literacy and language development is shared. ELA/ELD curricula should be well designed, comprehensive, and integrated. Effective teaching is essential to student success.
- Motivation and engagement play crucial roles in learning.

## BACKGROUND

### Family and Community Engagement

**Monseñor Oscar Romero Charter** promotes strong family and community engagement programs. These programs include: Quarterly Parent Conferences, Parent Advisory Committee equivalent to the English Learners Advisory Committee (ELAC), Bi-Annual Mini-Conferences, and monthly Parent Meetings at school site; which will include ongoing communications through letters, telephone, which support meaningful involvement and actively promote the development of parent and community leaders who effectively advocate on behalf of English Learners.

These programs help English Learner families establish home environments that support their children's learning. First, they develop communication strategies that engage everyone to design effective forms of school-to-home and home-to-school communication. Secondly, they recruit and organize family/community to support parents in their **Monseñor Oscar Romero Charter** policy as well as the decision-making process.

Ensuring the educational success of every child requires a concerted, collaborative effort on the part of parents, teachers, administrators, and the community at large.

### Staffing and Professional Development

Based on a clear and common vision of what constitutes effective teaching for English Learners, along with well-defined standards of practice and performance which explicitly state what teachers should know and do to meet the diverse needs of English Learners, **Monseñor Oscar Romero Charter** reviews and continues to develop a coherent and comprehensive professional development program. Among the programs is the Ellevation Program, which offers program management solutions for multilingual learners that goes beyond compliance and impacts instruction in every classroom based on a set of core beliefs and values.

- Linguistic and cultural diversity are assets, not barriers
- All educators deserve world-class software that is responsive to their needs.
- With the right training, support, and tools for effective instruction, teachers can make an enormous impact on even the most under-served students.
- Every student in America deserves an opportunity to achieve his or her highest aspirations.

<sup>1</sup>

Ellevation Strategies provides sustained, job-embedded, results-oriented professional development that helps every educator develop the capacity and skills to advance the language acquisition and content mastery of multilingual learners.

---

<sup>1</sup> Ellevation Professional Development

This program will assist teachers who work with English Learners to close the achievement gap and accelerate student achievement and language proficiency through grade twelve. The program will also be designed to increase the rate of English Learners who successfully attend college and advanced learning institutions.

### **Record Keeping**

To ensure that accurate records are kept, every student identified as EL attending **Monseñor Oscar Romero Charter** has an English Learner Folder (ELF). The ELF is maintained with the Coordinator of Instruction and shared with student's ELD teacher in grades 6<sup>th</sup> -through 8<sup>th</sup>. The ELF contains the following:

1. ELPAC Reports
2. Primary Language Assessments (IPT-Spanish)
3. Reclassification Documents
4. Home Language Survey
5. Parent Notifications
6. Waiver Documents
7. Other Norm-Referenced Standardized Test Results
8. Alternative Reclassification
9. Follow Up Reclassification
10. All assessments and scores

## **INITIAL IDENTIFICATION (CCR-EL4)**

### **Initial Identification**

**EL4** **Monseñor Oscar Romero Charter** will properly have identified, assessed, and reported all students who have a primary language other than English.

## Home Language Survey

**EL4a** A Home Language Survey (HLS) is used to determine the primary language and is on file for each student at **Monseñor Oscar Romero Charter**.

Schools in California are required, at the time of the student's enrollment into **Monseñor Oscar Romero Charter** to determine the language(s) spoken in the student's home in order to provide meaningful and appropriate instruction. This information is provided on the Home Language Survey (HLS). When enrolling a student at **Monseñor Oscar Romero Charter**, a parent or guardian is required to complete a Home Language Survey as part of the process.

## Assessment of English Language Proficiency

**EL4b** Each student whose home language is other than English as determined on the HLS has been assessed within 30 school days of initial enrollment in English comprehension, speaking, reading, and writing using the state-designated instrument.

Note: Administration of the HLS must include all four questions. The decision to test students who indicate a language other than English only on the fourth question should be made on an individual basis. Alternative assessments may be used for special education students with low-incidence and severe disabilities.

All students whose Home Language Survey indicates a language other than English on the survey's first three questions must be assessed in English language skills within thirty calendar days of initial enrollment in **Monseñor Oscar Romero Charter**. The questions are: (1) first language learned by the child, (2) the language most frequently spoken by the child at home, and (3) which language is most frequently used by the parents or guardians when speaking with the child.

The California English Language Proficiency Assessment (ELPAC), the state approved instrument for testing English language proficiency, is used for this purpose. The ELPAC assesses the student's proficiency in English reading, writing, speaking, and listening skills. Students identified as having a home language other than English by the Home Language Survey, but score at the Early Advanced or Advanced levels on the ELPAC are designated initially as fluent English Proficient and placed in the appropriate language program.

Students who indicate a language other than English only on the fourth question of the HLS, the language spoken most frequently by adults in the home need not be assessed with the ELPAC, and will be initially designated as English Only (EO) and placed in the appropriate program.



## Primary Language Proficiency Assessment

**EL4c** **Monseñor Oscar Romero Charter** has further assessed each English learner for primary-language proficiency, including comprehension, speaking, reading, and writing within 90 calendar days of initial enrollment. Parallel forms of the tests to determine English-language proficiency are used if available.

All identified English Learner students are assessed for primary language proficiency in reading, writing, speaking, and listening within ninety (90) calendar days of initial enrollment. An administrator trained and a fluent speaker of the student's primary language conducts the assessment. When no staff person is available for speakers of other languages, an informal assessment will be administered.

## Parental Notification

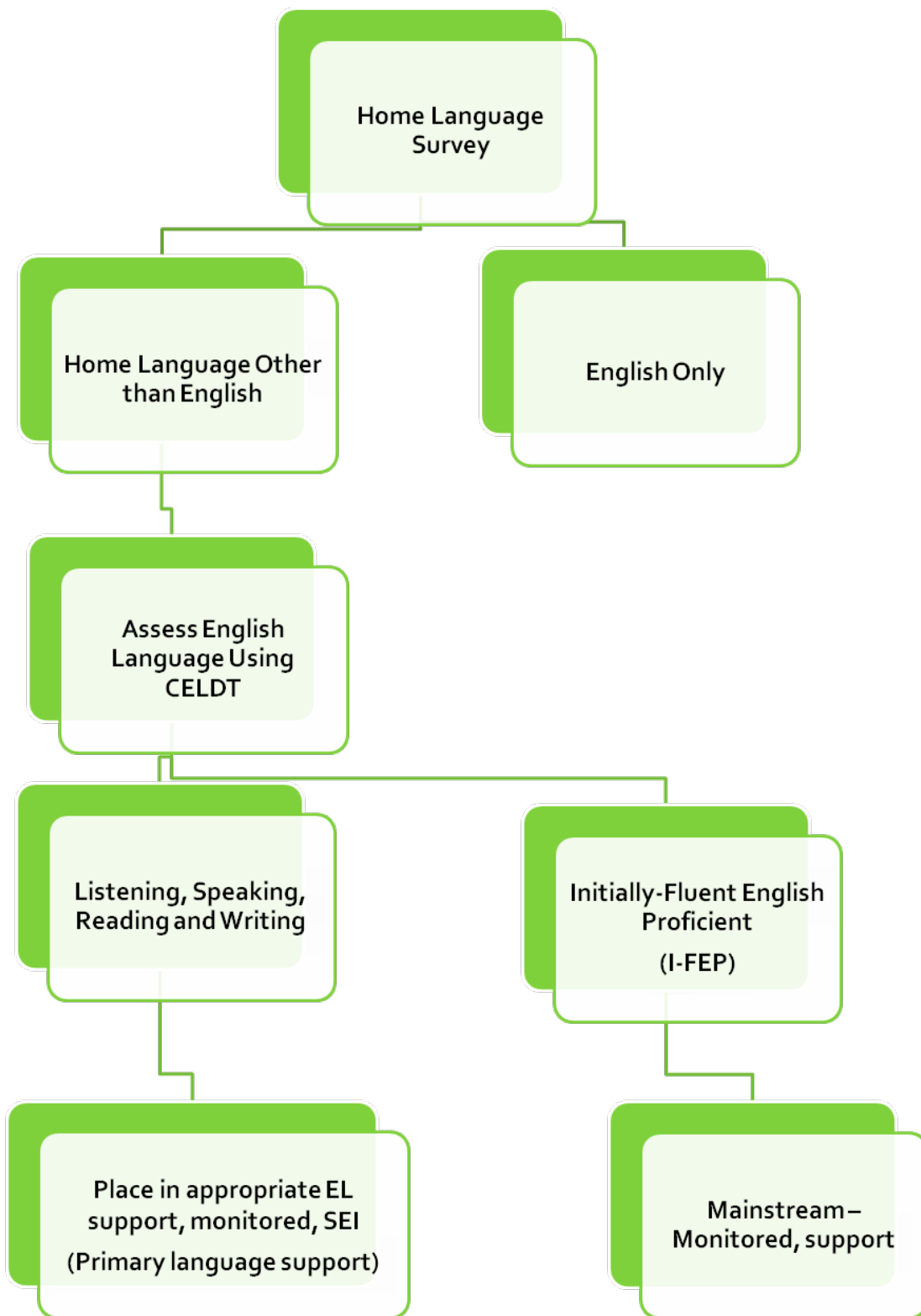
**EL4d** All parents of EL and FEP students have been notified in writing of their child's English-language and primary-language proficiency results.

Every effort should be made to inform parents immediately of results of assessments; no later than ten (10) days following the completion of all initial assessments, the Initial Language Identification Form and the Initial Primary Language Identification Form will be sent to parents by the site resource teacher.

## Maintenance of Records

Upon completion of the assessment process in grades 6<sup>th</sup> through 8<sup>th</sup>, the school will record the results into **Monseñor Oscar Romero Charter** database. Results of initial assessments are entered for each student and communicated to the student's teacher(s). A copy of the Home Language Survey, original forms with assessment results in English and Primary Language, and Parent Notification forms are placed in the student's English Learner Folder (ELF).

**FLOW CHART – Figure 1**  
**Assessment for Initial identification and Program Placement**





The instruction for **Monseñor Oscar Romero Charter** English Learners consist of two primary programs which comply with all current state and federal laws.

1. Structured English Immersion
2. English Learners Mainstream Programs

These programs consist of a Common Core State Standards-English Language Development component and access to the core curriculum including the following:

1. Self-image/Cross-Cultural Awareness
2. Differentiated Instruction
3. Differential Materials
4. Student Assessments (multiple measures)
5. Qualified Staff
6. Catch-Up Plan (Computer Assisted Learning)

### **Parental Involvement**

Parental involvement in decisions regarding the education of their children is required and critical to the student's academic success. At initial enrollment and every year thereafter, parents are notified of the educational options for their children including waivers for alternative programs.

All descriptions of the program are disseminated in the language comprehensible by the parent.

## Instructional Programs [CCR-EL3]

### Instructional Programs

**EL3** **Monseñor Oscar Romero Charter** is providing services to English learners to ensure that they are acquiring English-language proficiency and recovering any academic deficits that may have been incurred, in other areas of the core curriculum. **Monseñor Oscar Romero Charter** provides additional and appropriate educational services to English learners in grades 6<sup>th</sup> through 8<sup>th</sup> in all classroom situations. These services are for the purposes of enabling English learners to overcome language barriers and must be provided until they have demonstrated English-language proficiency comparable to that of the **Monseñor Oscar Romero Charter** average native English-language speakers and recouped any academic deficits that may have been incurred in other areas of the core curriculum as a result of language barriers.

**EL3a** Each English learner receives a program of instruction in English-language development in order to develop proficiency in English as rapidly and as effectively as possible.

**EL3b** English learners are meeting **Monseñor Oscar Romero Charter** content and performance standards for their respective grade levels in core curricular areas. **Monseñor Oscar Romero Charter** may choose to ensure that English learners acquire English and learn grade-level academic content simultaneously by implementing a program designed to keep English learners at grade level in all areas of the curriculum. **Monseñor Oscar Romero Charter** may choose to concentrate first on teaching English so long as **Monseñor Oscar Romero Charter** subsequently brings students to grade level in all other areas of the curriculum within a reasonable amount of time. **Monseñor Oscar Romero Charter** has a plan that describes any academic deficits will be monitored and provided intervention.

These models comply with all current state and federal laws. Parental involvement in decisions regarding the education of their children is required and critical to the student's academic success. At initial enrollment and every year thereafter, parents are notified of the educational options for their children.

In July 2017, the California State of Education adopted a historic new English learner education policy, the English Learner Roadmap. This policy recognizing English learners as a system-wide responsibility, recognizing a need to provide EL students with rich and challenging curriculum from early childhood to grade 12, and respects the value of English learner's primary language and culture. On July 1, 2018 the California Department of Education regulations for implementing Prop. 58 to establish programs for English Learners that promote proficiency in multiple languages and leverage students' home language as an asset, the following principles as outline at [cde.ca.gov](http://cde.ca.gov):

All programs for English Learners provide English Language Development (ELD) and access to the core curriculum. All descriptions of programs are disseminated in the language comprehensible to the parent.

Placement in Structured English Immersion (SEI) or the English Language Mainstream setting is based on assessment, of the student's English proficiency. ELs that lack Reasonable Fluency in English are initially placed in SEI with support in primary language when needed. Those scoring above this level are placed in the English Language Mainstream.

### **Elements of Program Options**

The goal and expectations for two English Learners programs are as follows: In the SEI, students scoring at ELPAC Levels 1 and 2, are expected to reach reasonable fluency 1-3 years with a time period of 5 to 7 years to be reclassified as FEP.

In our Mainstream program, students are expected to be reclassified in 3-5 years and 5 to 7 years to be reclassified as FEP.

### **English Learners Program Settings\* -**

\*All of the instructional programs designed for English Learners must contain the following components:

1. Explicit, well-articulated, standards-based, differentiated English Language Development (ELD) instruction, specifically designed for English Learners;
2. Well –articulated standards-based core curriculum instruction provided with primary language support and/or through specially designed academic instruction in English (SDAIE); and
3. Structured activities designed to develop multicultural competency and positive self-esteem, integrated through the core curriculum.

Task-based instruction allows students to work with concepts and language in a variety of ways (e.g. via reframing, where students can act, draw, or map out the concepts, or use poetry, song, chant, letters, or keep diaries);

1. Grade-level content instruction in English designed for English Learner;
2. Facilitating English Learners in accessing the same core curriculum as that of English-only students;
3. Language-sensitive and culture-sensitive content teaching;
4. Developed through comprehensible language;
5. Making accommodations in the learning environment so more students are able to access the content;
6. An ideal place to use language for communication;

7. A natural vehicle through which to teach English;
8. Good language teaching when the input is made comprehensible;
9. Instruction encouraging the active use of language and the emphasis on big ideas;
10. Instruction that allows the teacher to check for understanding frequently using interactive strategies;
11. Integrating assessment in an on-going and formative manner through observations portfolios, journals, and product-development; and
12. Built on language modifications such as pause time, questioning, pacing, and highlighting.

### **Key Features of SDAIE**

In effective SDAIE classrooms, leaders, and teachers work together to ensure the use of sound practices that make content comprehensible for English Learners. These practices include:

- |   |                               |
|---|-------------------------------|
| 1) modeling                                 | 7) bridging                   |
| 2) contextualizing                          | 8) building schema            |
| 3) reframing                                | 9) developing metacognition   |
| 4) checking for comprehension               | 10) monitoring/assessing      |
| 5) questioning                              | 11) adjusting speech register |
| 6) orchestrating all modalities of learning | 12) interacting               |

For English Learners at Beginning, Early Intermediate, and sometimes at the Intermediate level, access to the core can be facilitated by primary language support. The assignment of a BCLAD teacher is always the best method for providing language support.

However, when there are 10 or more students of the same language who need a particular course and a BCLAD teacher is not available, then the students will be grouped together with a CLAD-certificated teacher and provided a bilingual instructional assistant, who will use the primary language to motivate, clarify, direct, support, and explain.

### **Structured English Immersion (SEI)**

The Structured English Immersion Program is an English language acquisition process for young children in whom nearly all classroom instruction is in English but with the curriculum and presentation designed for children who are learning the language. Students are taught subjects “nearly all,” but not exclusively in English. Teachers may use the student’s primary language to motivate, clarify, direct, support, and explain. The goal of this program is for English Learners to demonstrate a reasonable fluency in English.

**Monseñor Oscar Romero Charter** makes every effort to use a simultaneous approach designed to allow English Learners to learn English and to keep up academically on grade level in the content areas. In instances when a student does fall behind in his/her academic progress, an

individualized catch-up/recovery plan will be developed to address specific needs. Student identified for this type of support will be placed in a setting that offers additional English Learner Support.

English Language Development (ELD) and Specially Designed Academic Instruction in English (SDAIE) are both used to meet the requirements of Structured English Immersion. ELD specifically teaches students English: listening, speaking, reading and writing. SDAIE provides grade level academic instruction that gives students access to the core curriculum and teaches English vocabulary and reinforces English structures. Primary language support is provided as needed for the student to access the core.

#### Program Requirements

- All teachers must be appropriately certified, i.e., CLAD, BCLAD or in training, providing core instruction for ELs.
- Parents must be informed of the placement of their children in a Structured English Immersion Program and must be notified of the opportunity to apply for a parental exception waiver. In order to request a waiver, parents must visit the school unless a specific hardship exists.
- Core instruction in Language Arts, Math, Science, and Social Science is taught “overwhelmingly” in English using primary language support and SDAIE strategies.
- ELD instruction is provided daily using the **Monseñor Oscar Romero Charter** adopted programs delivered by an appropriately certified teacher, i.e., CLAD, BCLAD or in training. In grades 6<sup>th</sup> through 8<sup>th</sup> students are grouped according to their level of English proficiency, for 45 minutes, this is provided during the Success For All Reading period, as determined by the ELPAC and other local ELD assessments students are provided ELD instruction per day at ELPAC levels 1 and 2, and at ELPAC Levels 3-5 placement is determined per each individual student diagnosis. At all levels, ELD instruction is coordinated with English Proficiency levels as determined by the ELPAC. Instruction must include listening, speaking, reading, and writing.
- Primary language materials may be used in all subjects.
- All students participate in activities that promote a positive self-image and cross-cultural understanding.
- After participating in this program for one year, students will be placed in the English Language Mainstream Program unless the student has not reached the level of reasonable fluency.

**\*Note:** Best practice and evidence from schools throughout the state support a design that provides substantial ELD (Two to three separate periods daily) for ELs at ELPAC levels 1 and 2. It is also good practice to have separate, 2-hour blocks of ELD for ELPAC level 3. A reading laboratory, as well as access to articles through Achieve 3000 and materials on the Internet will be provided in **Monseñor Oscar Romero Charter** Advisory, PASS (Passport to Student Success)/Rti to support student advisement, and supplemental support.

However, for some ELPAC 3s, and for ELPAC 4s and 5s, ELD instruction may be provided within sheltered or even “mainstream” English Language Arts/Literature (ELA) classes. Here are reasonable criteria for judging whether such ELD instruction meets the needs of students and the requirements of law:

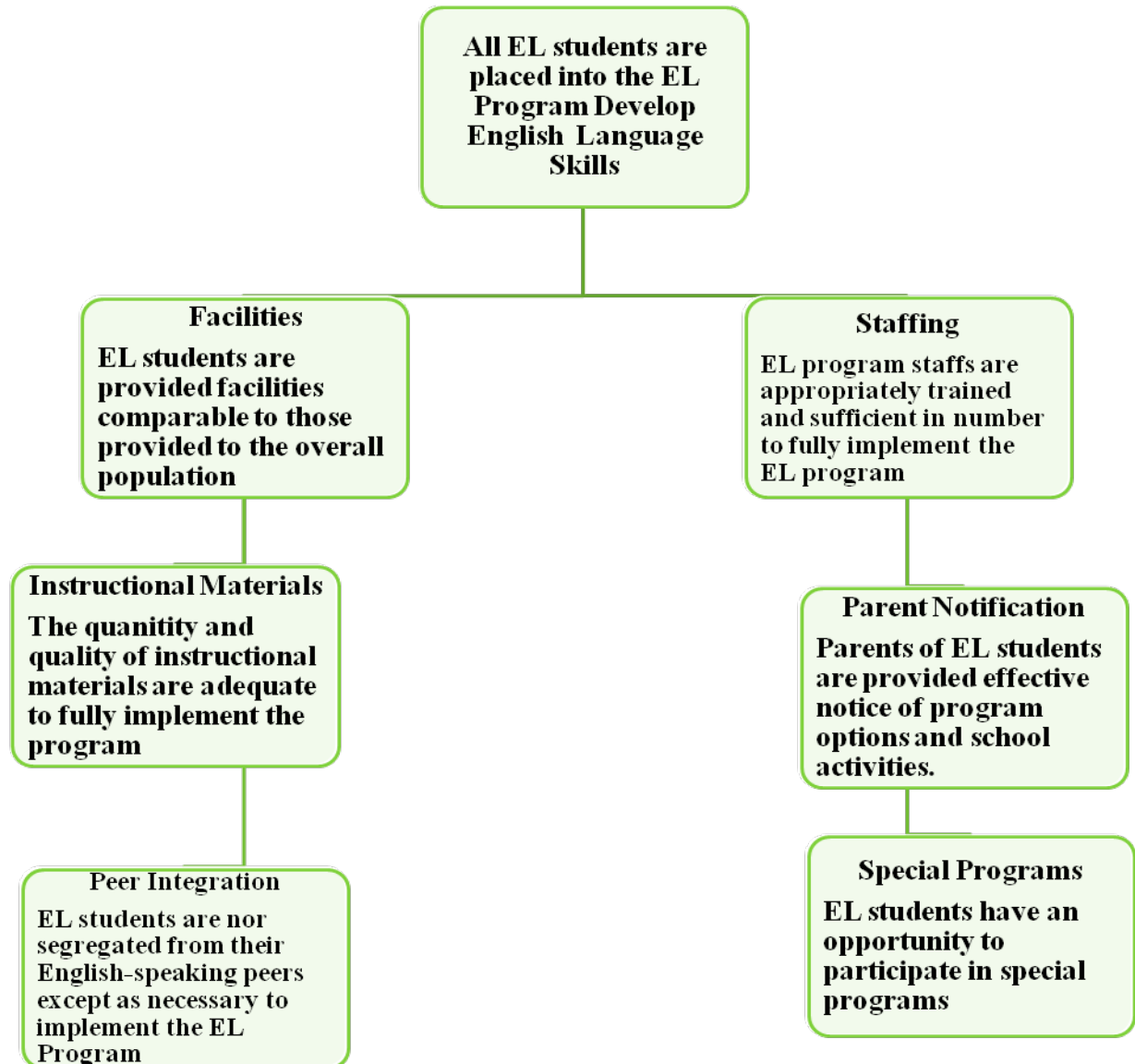
- a. The ELA teacher knows the ELPAC levels of students (oral, reading, and writing).
- b. The teacher holds a CLAD, BCLAD, or equivalent EL authorization.
- c. The teacher also uses interim ELD assessments beyond ELPAC
- d. ELs are grouped (for at least some time) for ELD instruction by ELD level, and that instruction matches their ELD diagnosed need. It is different from the grade-level, ELA content. ELD need not be taught daily. Time and frequency should be justified.
- e. The teacher and students can identify which ELD Standards are being taught.
- f. The right materials for ELD are available and used.
- g. The teacher has evidence (see “c”, above) that ELs are making reasonable progress (i.e., there is progress toward reaching ELD benchmarks).

### English Language Mainstream Program

In the English Language Mainstream Program, the student is placed into an all-English class with minimal primary language support. The student will receive ELD from the classroom teacher and be assigned to a section of ELD until they acquire reasonable fluency in English. English Language Mainstream Program teachers will be responsible for providing ELD instruction that continues the students’ English language development, preparing them for reclassification, and make up any academic deficits which may have been incurred in the core curriculum as a result of language barriers. In addition, students will be provided with one or more core subjects taught using SDAIE. SDAIE is an instructional methodology designed to make lessons as comprehensible as possible to non-native speakers of English so that these students will be able to progress in their studies of Language Arts, Math, Science, and Social Science and meet grade-level standards.

### Program Requirements

- All teachers must be appropriately certified, i.e., CLAD, BCLAD, Hughes or in training for these authorizations.
- ELD instruction is provided using **Monseñor Oscar Romero Charter I**-adopted program from an appropriately certified teacher, i.e., CLAD, BCLAD, or Hughes. In grades 6-8, students are provided 1 period of ELD instruction per day at ELPAC Levels 1 and 2, and at ELPAC Levels 3-5. At all levels, ELD instruction is coordinated with English proficiency levels as determined by the ELPAC. Instruction must include listening, speaking, reading, and writing.
- Core instruction in Language Arts, Math, Science, and Social Science is “overwhelmingly” in English using SDAIE methodology.



**Expanded Program (Grades 6-8)**

The Instructional program for students enrolling with ELPAC scores at levels 1 or 2, will consist of a 3-year program and/or a modified program.

**Example of Teacher Monitoring Template (To be completed by English Language Arts Teacher and conference all teachers)**

**Sample**

Year	Criteria	ELPAC Score	Smarter Balance English Language Arts	Grade English Language Arts	SBAC Interim Assessment Results	Teacher Recommendation



## ENGLISH LEARNERS (EL's)

**Monseñor Oscar Romero Charter** will administer the **ELPAC** initial identification assessment to students within 30 calendar days of enrollment for those students who indicate on the **Home Language Survey** that their primary language is other than English and for those students who have no record of English language development assessment results. **Monseñor Oscar Romero Charter** will also administer the **ELPAC** annually to identify English Learners until they are re-designated from English Learner to Fluent English Proficient. According to the California State Board of Education ELD Standards:

- Beginning
- Early Intermediate
- Intermediate
- Early Advanced
- Advanced

### Reclassification

#### The California State Board of Education's Reclassification Guidelines for English Learners

1. Comparison of performance in basic skills – earning C grades on core subject of English at grade level.
2. Assessment of English Proficiency- ELPAC Results, i-Ready
3. Teacher evaluation of student academic performance
4. Parent opinion and consultation

Grade Level	Performance in Basic Skills	Formative Assessment	Classroom Performance	Teacher Evaluation
6-8	<ul style="list-style-type: none"> <li>• ELPAC Results (4 or 5 Score)</li> <li>• Smarter Balanced (Standard Met or Standard Exceeded)</li> </ul>	<ul style="list-style-type: none"> <li>• SBAC Interim Assessments</li> <li>• I-Ready</li> <li>• Ellevation Program Management</li> <li>• Other to be adopted</li> </ul>	<ul style="list-style-type: none"> <li>• Grade in English Language Arts Course (C or better)</li> </ul>	<ul style="list-style-type: none"> <li>• Teacher Observation Rubrics</li> <li>• Teacher Judgment that is students is sufficiently prepared to perform in core curriculum at a level equal to Native English speakers</li> </ul>

As stated **Monseñor Oscar Romero Charter continues** to work closely, one-on-one with teachers reviewing student portfolios in determine if students are eligible for the reclassification redesignation process; which indicates that students, while achieving an early advanced and advanced on the ELPAC were not able to be re-designated as the student did not meet the criteria listed above, specifically the comparison of performance in basic skills.

The *Language Census Report* concludes that ELs are placed in other (undefined) instructional setting and not in a structured ELD program. Every Student Succeeds Act requires a development of a *Local Education Plan*. **Monseñor Oscar Romero Charter** is following and adhering to the California Common Core State Standards/English Language Arts/English Language Development and as outlined in our EL Master Plan for English Learners. Further an assessment of the student’s primary language literacy level skill will be used to determine the student’s English level, and used as a base for English Language Development.

Goals for ELs are:

1. English learners (ELs) acquire full proficiency in English as rapidly and effectively as possible. (20 USC 1703[f], 6892; EC 300[f], 5 CCR 11302[a])
2. ELs meet state standards for academic achievement. (20 USC 1703[f], 6812, 6892; 5 CCR 11302[b]; *Castañeda v. Pickard* [5<sup>th</sup> Cir. 1981] 648 F.2d 989.)

The instructional improvement plan is based on the student academic achievement, student goals, organizational components of Monseñor Oscar Romero Charter and various organizational perspectives or frameworks.

### **Stage 1: Implementing an English Mainstream Service Option**

**Time Frame:** September 2016 through June 30, 2024

**Implementation Target Date:** September 1, 2023

- Integration of the Common Core State Standards English Language Development (ELD) standards into the school-wide curriculum with performance indicators
- Staff development on reviewing ELD Curriculum and ELD/language arts program, and programs to increase vocabulary and English acquisition.
- Staff development on utilizing curriculum standards instruction and assessments to determine academic levels upon enrollment
- Implement assessments to determine academic levels upon enrolling
- Staff development for teachers to learn how to incorporate an English Mainstream (EMI) Service Option and learn and use ELD Teaching strategies.
- Coordinator of Instruction and ELD Teacher observations of other charter school's EMI model
- Implementation of an English Language Development Course, at least two courses ELD 1 for beginning and Early Intermediate. ELD 2 for Intermediate and Early Advance. Since most courses have multiple levels professional development will be provided to staff to differentiate ELD for the multiple proficiency levels.
- Implement state-approved ELD language arts program into ELD courses.
- Action Research: Stages of Concern.

### **Stage 2: Follow-up and Monitor Progress**

**Time Frame:** September 2016 through June 30, 2024

**Implementation target date:** September 1, 2023

- Action Research: Survey Levels of Use (LOU)
- Coordinator of Instruction, Director of Academic Achievement, and Student Achievement/Executive Administrator s will be available to encourage teachers to focus on lesson design and delivery on the diagnosed linguistic needs of EL's.
- Staff development follow-up to review ELD strategies and ELD program
- Monitor and follow-up on post-assessment results on a monthly basis
- Monitor teachers that are working toward CLAD/BCLAD emphasis.
- Implement ELD component to student portfolio (writing sample graded on set rubric and rubrics for professional levels). A pre and post-writing sample is to be implemented rubric for proficiency levels.
- Provide staff development on the student language proficiency reclassification process
- Implement student language proficiency reclassification process.

Table 1.3

<b>Training Component</b>  <b>Professional Development as per California Department of Education</b>	Staff development on reviewing and implementing ELD Curriculum and ELD/Language arts program, and other vocabulary and language acquisition programs. Three Series (Introduction, Implementation, Follow-up) 2 workshops each	Staff development on use assessments aligned to ELD standards to determine academic levels upon enrollment.	Staff development for teachers to learn how to incorporate an English Mainstream (EMI) Service Option and learn and use ELD teaching strategies.
<b>Theory Presentation</b>	Power Point Presentation on English Learner Program	Professional trainer will conduct workshop on using the assessment	Current English Mainstream Instruction (EMI) teachers will conduct an ELD lesson, focusing on ELD strategies.
<b>Modeling</b>	The various features of the materials will be modeled	The trainer will model how to set up the assessments on the computer.	Current EMI teachers will come and conduct an ELD lesson, focusing on ELD strategies.
<b>Practice</b>	Participants will practice using the instructional materials	Participants will practice using the computerized assessment	Participants will form groups and practice ELD strategies on each other
<b>Feedback</b>	Facilitator and other participants will provide feedback.	Facilitator will provide feedback	Current EMI teachers will provide feedback to groups.
<b>Coaching</b>	Facilitator will provide coaching to participants' groups	Facilitator will provide coaching to participants' groups	Current coach will provide support to individual teachers

## **Success Indicators**

The implementation of the ELD program will be reviewed by using assessment data results from indicators as it relates to student academic achievement. Growth on ELPAC assessment will be used to determine if students are meeting set growth target as indicated in their individual learning plan. Goals for ELs are:

1. English learners (ELs) acquire full proficiency in English as rapidly and effectively as possible. (20 USC 1703[f], 6892; EC 300[f], 5 CCR 11302[a])
2. ELs meet state standards for academic achievement. (20 USC 1703[f], 6812, 6892; 5 CCR 11302[b]; *Castañeda v. Pickard* [5<sup>th</sup> Cir. 1981] 648 F.2d 989.)

The following assessment instruments will be used to monitor progress and to determine student placement.

- Set growth achievement detailed in individual student learning plan.
- Annual Smarter Balanced Assessment
- Performance Assessments, including an oral presentation and inquiry format
- Student Portfolio: Writing Sample
- ELPAC

In addition, **Monseñor Oscar Romero Charter** will work during the 2023-24 school year toward achieving the following success indicators:

1. English Learners will increase by +3% on the basic re-designation in the Smarter Balanced scores for English/Language Arts section
2. English Learners will increase by +3% on the basic re-designation in Smarter Balanced scores for the mathematics section.

The English Learner Master Plan will be used as a resource guide for curriculum planning. Teachers will attend appropriate English Learner training or receive such staff development. This will allow our teachers to become qualified to train other teachers during in-service professional development.

**Monseñor Oscar Romero Charter** teachers also participate in professional development, or provided via staff development or university training.

### **A. Professional Development**

The development of the faculty and staff is of primary importance to the **Monseñor Oscar Romero Charter** community. As the school progresses, student learning needs will be primarily addressed through the formal faculty meetings, leadership meetings, and assessment of student achievement data. For example, recognized that due to the low proficiency rates for

incoming students in English Language Arts, the school staff needed assistance with strategies specific for English Learners. Steps will be taken every year to increase professional development for leadership and staff. **Monseñor Oscar Romero Charter** recognizes the importance of being strategic and allocates sufficient funding to ensure ongoing professional development.

#### B. Continuous Professional Development

A key component of the **Monseñor Oscar Romero Charter** instructional goals is the use of backward design in teacher developing their unit plans and instructional effectively. For support **Monseñor Oscar Romero Charter** has received instructional coaching and professional development from the Success For All Foundation, GEMAS Consulting, and Loyola Marymount University, this includes ELD, SDAIE, strategic design unit planning and instructional support.

During ongoing professional development teachers use benchmark results, mid-year and end of the year assessments, as well as other student data. Reflective data taken from leadership, faculty, staff, and parents helps develop the planning for professional development. As stated above, the school has focused much of the professional development toward strengthening of instructional strategies.

The school has adopted an instructional model that focuses on the following strategies:

- Collaborative and Project-Based Learning
- Writing to learn in all subjects
- Literacy groups during SFA and throughout the day
- Questioning strategies, which include reading strategies such as clarify, predicting and summarizing; learned in SFA and expected in all instruction.
- Scaffolding texts; which is modeled and used throughout the SFA program.
- Academic classroom talk, we believe the power is in the discussion.
- Interactive computer assisted instruction

A main component of the induction process is the **Monseñor Oscar Romero Charter** teacher's summer preparation session. This is a two-week teacher led orientation prior to the start of the academic school year. New teachers attend various meetings and workshops to acquaint them with procedures and processes relative to the operation of the school and culture of the campus. Teachers are introduced to the **Monseñor Oscar Romero Charter** instructional model and veteran teachers present workshops. In addition, new teachers will be enrolled in the sponsored Beginning Teacher Support and Assessment Process.

All **Monseñor Oscar Romero Charter** teachers take part in a weekly teacher meeting that focuses on instruction. These meetings are held every Monday from 2:30 p.m. to 4:00 p.m. The initiation of ongoing professional development follows from mid-year and end of the year assessments. Reflective data taken from leadership, faculty, staff, and parents helps develop the planning for professional development. As stated above, the school has focused much of the professional development towards strengthening of instructional strategies.

**Monseñor Oscar Romero Charter** will provide trainings and access to workshops in support of on-going standards based alignment for instructional delivery to provide for successful student academic achievements. Teachers, administrators and staff will participate in the training process to identify activities that will provide:

Teachers with the subject matter knowledge and teaching skills to provide all students the opportunity to meet challenging state academic achievement standards, and instructional leadership with educational skills to help teachers provide all students the opportunity to meet the state's academic achievement standards.

Professional Staff Development plan is aligned with Every *Student Succeeds Act* (ESSA) legislation will be incorporated in this plan. (Change as per new adoption).

Staff professional development is aimed at closing the achievement gap. Orientation begins two weeks before the school year begins. This time is used not only to express in detail the values and expectations of the school, but also allows the teachers the time necessary to collaborate and learn about each other. All teachers attend professional development in-services offered by the administration throughout the school year. Operation check-in meetings are held on Tuesday mornings from 3:45 pm until 4:15 pm. Teachers are offered the opportunity to observe their colleagues teach, be observed by staff or education consultants; as well as other stakeholders Teachers have been provided with weekly, individual planning time to be used to plan, reflect, and improve their quality of teaching. All teachers have specific planning time. **Monseñor Oscar Romero Charter** Block Schedule allows for teacher to prepare, observe other classroom, research, and work on individual student plans.

Teachers will have the opportunity to review benchmarks, assessments, and progress of each of their students in their classroom and progress in other classes. They also can gain knowledge from observed trends in data collected, data analysis, strategies that work, challenges and strategize to meet student needs. Staff is encouraged to attend workshops and professional development seminars throughout the year.

In-service themes include: Special Education-Teaching strategies, Student Study Team (SST), effective school-wide study practices, and an opportunity for teachers to collectively reflect and assess individual student academic achievement. Experienced staff members, educational consultants or professional experts facilitate these faculty meetings and in-services. Staff development supports the quality of teaching that occurs at **Monseñor Oscar Romero Charter** and assist teachers with planning and implementing a rigorous, college preparatory curriculum that is research-based and aligned to the California Common Core ELD State Standards. Professional development also provides teachers with resources and strategies to collaborate and share their expertise.

#### D. Collaboration and Integration

**Monseñor Oscar Romero Charter** also uses professional development time to assist teachers accentuate key concepts school-wide, make cross-curricular connections, coordinate units, and integrate content areas. **Monseñor Oscar Romero Charter** ensures that teachers of related subjects (i.e. science and math) meet for common planning time during the week. This time has been built into teachers' schedules as part of the school day. This time is used to plan strategically and build units around "big ideas" or knowledge networks. This time has also been used to refine schoolwide writing rubrics and other instructional tools. During their weekly collaborative, cross-curricular planning times, teachers build on the school-wide projects and concepts that have been introduced.

**Monseñor Oscar Romero Charter** understands the importance of utilizing research-based instructional practices to promote student achievement. In order to address how learning best occurs, faculty will be provided professional development and support in the following areas:

- Design standards-based instruction (using the principles of backwards design)
- Align appropriate assessments to the standards
- Implement instructional activities that are aligned to standards and reflect research-based best practices

Teachers will incorporate instructional strategies detailed in *Classroom Instruction that Works*, by Marzano, Pickering, and Pollock. In addition to using the Marzano's observation and self-assessments instruments:

The traditional backwards design process guides teachers through a three step process:

- Internalization and prioritization of the California Common Core Standards
- Differentiated assessment methods aligned to prioritized standards and identified learning targets
- Innovative, research-based instructional strategies clearly articulating student learning objectives

This process of aligning standards and assessments to real-world learning applications that takes the shape of meaningful, rigorous, and assessable projects. At **Monseñor Oscar Romero Charter**, it will be the expectation that students are engaged in the curriculum and learning objectives at all times. Teachers are expected to continuously communicate learning objectives to all students while formatively and summative assessing for student mastery of all concepts and Common Core State Standards. Research clearly suggests that learning best occurs when students are actively engaged in their own learning. This requires that students are involved in conversations about learning objects, instruction, and assessment. Furthermore, this student-centered approach supports a more culturally relevant curriculum that connects with student's interests and prior experiences. Frequent and meaningful connections with parents, and engaging them in conversations about their child's education will also ensure that the academic program reflects the diversity of the community being



served. As part of the curriculum design process, research-based instructional strategies for increasing student achievement will be embedded into the daily culture of the classroom. Strategies brought to light in Classroom Instruction that Works (Marzano, Pickering, and Pollock) will be utilized by teachers in their classrooms. These researchers have compiled teaching practices and strategies that "have a high probability of enhancing student achievement for all students in all subject areas at all grade levels" (Marzano, Pickering, Pollock, 2001). Teachers will be challenged to examine the three elements of effective pedagogy: Instructional Strategies, Management Techniques, and Curriculum Design.

The professional development in preparation will continue to focus on this integration, as a transition period towards a more complete use of the technique in subsequent years. The foundational coursework, as outlined above, will use a repertoire of instructional strategies, curriculum, and materials. Instructional strategies will include:

- Direct instruction
- Research based projects
- Cooperative group work and projects
- Inter-disciplinary approaches to curriculum
- The presentation of clearly defined "Learning Targets" for all students by all teachers
- Rubric self-assessment
- The involvement of community members and educational partners in instructional presentation
- Mentoring program
- Implementation of a Professional Learning Community for peer interactions based on the work of nationally recognized work of Richard DuFour and Robert Eaker.
- Scope and Sequence
- Curriculum will address all state required standards and will utilize:

**Monseñor Oscar Romero Charter** has incorporated the following recommendations:

- Have uniform standards: **Monseñor Oscar Romero Charter** will have clear and high expectations of all students that fully align with the California Common Core State Standards.
- Make the curriculum challenging: Rigorous curriculum will be organized around major concepts that students are to know deeply.
- Help students catch up: A personalized environment and regular assessments will ensure that no students fall behind. Extra support before and after school will be given to those students in need.
- Provide good teachers: All **Monseñor Oscar Romero Charter** core subject teachers will have an appropriate credential in their subject matter based on ESSA requirements for highly qualified teachers. In addition, regular planning and professional development time will allow teachers to improve their practice.

Young people want to make a difference in their families and communities and they value experiences that empower them to do so. Learning must both reflect students' lives and expand their understanding to encompass a global perspective. Schools must provide opportunities for students to develop personal responsibility, self-management of their own learning, and practice democratic principles. They must celebrate authentic accomplishments; as well as, cultural and individual diversity in an environment of tolerance and respect. These concepts are the foundation of the **Monseñor Oscar Romero Charter**.

### **Program Goals**

**Monseñor Oscar Romero Charter** will create an educational environment that will foster success in the classroom; as well as, the community. To this end, the school works relentlessly toward the following program goals:

- 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.
- Enable students to become life-long learners.

These foundational values inform the school's philosophy and the Schoolwide Learning Outcomes (SLOs). The faculty through discussion and collaboration developed the SLOs. The school leader annually sets academic goals and the SLOs to evaluate both students and faculty. In this respect, the school's vision, philosophy, goals, core values and SLOs have a common thread of setting high expectations for students in academic and personal success.

### How Students Become Self-Motivated, Competent, Lifelong Learners

**Monseñor Oscar Romero Charter** is committed to enabling students to become self-motivated, competent, lifelong learners by providing a multicultural, student-centered environment in which all students are held to high academic and behavioral standards. **Monseñor Oscar Romero Charter** continually strives to develop a culture that fosters in student's self-motivation, competence and the foundation of lifelong learning.

### Purpose

Administrators, faculty, parents and staff working with students demonstrate a shared purpose to develop each student's knowledge and skill to its highest potential. There is evident belief that this purpose is primary for the school and possible to achieve for virtually every student. The school's goals, policies, practices, attitudes and allocation of resources reflect the primacy of this purpose.

## Leadership

Leadership is shared among administrators, faculty, classified staff, students and parents. Decisions are reached through consensus and minority opinions are considered and valued. Departments and individual teachers enjoy a large degree of professional autonomy. They are encouraged to use their best professional judgment in accordance with California State Department of Education, and/or Common Core State Standards, and NGSS in achieving high levels of student learning.

## Environment

The environment of the school is safe, orderly and supportive. Students find the school a good place to study and a pleasant place to be. Schoolwide standards for students' behavior are perceived by students and staff members to be fair and equitably enforced. Instances of vandalism and violence on campus are dealt with in a timely manner; student absenteeism and dropout rates are maintained at a minimum level.

Diagnostic assessments that will be used to enable **Monseñor Oscar Romero Charter** to monitor the effects of proposed changes on student performance

### **A. Monseñor Oscar Romero Charter Assessments**

The following is a sample of the kinds of standardized reports available to the school community for analysis:

i-Ready is used to generate assessments and provide results for analysis. **Monseñor Oscar Romero Charter** data analysis tools assist teachers to target areas of academic need.

Data Dashboard: Two-page snap-shot of school performance. Information includes attendance, enrollment, demographics, curriculum embedded assessments, i-Ready and Smarter Balanced data.

Smarter Balanced Test Results are mailed to our school, and in turn **Monseñor Oscar Romero Charter** will mail individual data results home to the student's parents. Parents and others can also access Smarter Balanced school data by using the California Department of Education website.

Each instructor will review and analyze the Smarter Balanced data with each student and with parents during Parent-Teacher conferences.

Their Advisory Teacher monitors individual Learning Plans. Regular meetings (every five weeks) are held with each student, to monitor the student's academic and social progress. As needed, new goals are set with clear benchmarks identified for yearly growth.

Curriculum Embedded Assessments: quarterly teacher/ department tests.

ELPAC-- the California English Language Proficiency Assessment is a standardized test generated by the state to look at the progress of students who are developing proficiency in English. All EL students take this in the fall of every school year.

Our students' scores on the Smarter Balanced and additional demographic statistical information are used by the state according to the state formula. This statistical data includes sub-group reports on meeting and exceeding.

Teachers have developed standards-based curriculum and are in the process of developing or testing common assessments that enable the instructional staff to assess, on an on-going basis, student competency in key content-area standards. Teachers share their analyses of student performance and suitability of the benchmarks for assessing student

Student Grades: Reports are mailed home frequently (every 5 weeks) during the year to indicate student progress. Parents may contact teachers or meet with Advisor on a regular basis.

Alert Solution: Phone communication tool used to provide parents with up-to-date information about their students' attendance, class performance and test scores, as well as school events and upcoming activities.

B. State Assessments

As is required by the California Department of Education, students will also participate in the Smarter Balanced and all other mandated accountability programs (ELPAC, etc.). **Monseñor Oscar Romero Charter** will meet all statewide standards and conduct the pupil assessments required pursuant to Section 60602.5 and any other statewide standards authorized in statute or student assessments applicable to students in non-charter public schools. We firmly believe that the academic program will fully prepare students for success in these statewide assessment programs. Additional support structures (i.e., after-school tutoring, summer enrichment programs, mentoring programs, peer study groups, etc.) will be in place to ensure that students surpass the performance of their peers in comparable high school settings.

C. Ongoing Assessment of Pupil Outcome Goals

Student Performance and Assessment will consider several assessment methods, specifically based upon the assessment program created and researched by Richard J. Stiggins, author of Student Involved Classroom Assessment, 3rd. 2001. Stiggins' work is based on the idea that effective assessment must directly correspond to specific achievement targets that have been made apparent to students as part of the instructional program. This method has been included based on proven successful use in secondary educational settings and includes such assessments as selected responses, essays, performances, and products. Additionally, the school will use Houghton Mifflin Reading Inventory

In the context of the assessments described above, **Monseñor Oscar Romero Charter** will use the i-Ready or other selected tools. These assessments will provide opportunities aligned to Common Core State Standards. The internal system will allow teachers to generate standards-based assessments, and upload and analyze data in real time. Staff will use all parts of the assessment system in an ongoing effort to examine student performance and revise instructional practices to address student needs. Staff will continuously be challenged to rethink current pedagogical practices to meet the changing needs of new and existing student populations.

Student interaction with teachers around data is a vital component of **Monseñor Oscar Romero Charter**. The use of i-Ready, or selected tools will assist in the qualitative assessment of student growth in relation to the school goal of establishing a college-ready culture.

Diagnostic assessments will be used to enable **Monseñor Oscar Romero Charter** to monitor the effects of proposed changes in student performance.

In addition to Common Core State Standards, **Monseñor Oscar Romero Charter** will use the following collection of methods to assess student progress:

- **DIAGNOSTIC AND CONTENT AREA MASTERY TEST** demonstrates or reflect students' weaknesses and inform teachers of the areas where students need support, allowing for differentiation and intervention. For this goal, the staff is reviewing to adopt an assessment program which is a computerized, adaptive, state aligned assessment program that provides educators with information they can rely on to improve teaching and learning and predict performance on state tests.
- At the present time we are using state recommended textbooks, which are aligned to subject area state standards. We will be adopting new textbooks aligned to Common Core State Standards.
- Unit tests are being used to provide an ongoing view of each student's mastery of subject areas.
- Ensure that benchmarks are set for each subject area. Since **Monseñor Oscar Romero Charter** will have at least one teacher, teaching each course they are aligning curriculum to Common Core State Standards and checking for mastery of content as delivered.

Use of CA Common Core State Standard English Language Arts, English Language Development.

The following assessments will be used during the 2023-2024 school year. **Monseñor Oscar Romero Charter** will use specialists who provide our teachers support on reading assessments, diagnoses, prescription for intervention and remediation and on-going support.

**INDIVIDUAL READING LEVEL ASSESSMENT** allows teachers to choose appropriate reading materials for students and inform our acquisition of leveled reading libraries. The information from the assessment also assists teachers in diagnosing student's difficulties in reading and creating specific reading interventions for student's needs.

To incorporate and monitor our English Learners in their mastery of English in a timely fashion, assessment will be used as follows: **Monseñor Oscar Romero Charter** has chosen to follow the Common Core State Standards adopted and aligned ELD program. Students will be regularly assessed using i-Ready or selected diagnostic and formative assessments. Collecting data should give teachers additional data to better serve EL students' language acquisition and reading needs in particular.

**BENCHMARK WRITING ASSESSMENTS** allow teachers to diagnose student's writing needs and differentiate instruction based on those needs. Our writing assessments will be used school-wide, contain school-wide prompts and rubrics, and all teachers are involved in the scoring and teaching of the writing genre in focus. The data from the writing assessments will be collected to chart individual and school-wide progress and predict performance on the Smarter Balanced writing assessment.

**STUDENT INDIVIDUAL PORTFOLIOS** provides each student with the opportunity to demonstrate and reflect upon his or her learning. Teachers at **Monseñor Oscar Romero Charter** have chosen to follow a backwards design model to design relevant units with several performance tasks and benchmarks included. Portfolios that document students' application of those performance assessments and provides important information about students' learning that cannot be easily captured through more traditional methods of assessment. Throughout this process, students will analyze their academic progress, and with a teacher set new short and long term goals for improvement.

**EXHIBITIONS OF MASTERY** demonstrate student learning of enduring understandings, and allow for project-based learning. These authentic performances of understanding will meet the following criteria:

Essential: exhibitions will be focused on the heart of the discipline, not arbitrary,  
 Enabling: constructed to point students to towards more sophisticated use of their skills and knowledge.

Contextualized and Complex: intellectual challenges that require students to make connections, apply their knowledge to novel situations, and have real-world relevance, and Feedback and Refinement: include multiple opportunities for students to improve their work based on feedback.

**Local Educational Plan (LEA) Component Performance Goal 2**

**All Limited-English-proficient students will become proficient in English and reach high academic standards, at a minimum attaining proficiency or better in reading/language arts and mathematics.**

**Planned Improvement in Programs for LEP Students and Immigrants (Title III)**

(Summarize information from district-operated programs and approved school-level plans)

Description of how the LEA is meeting or plans to meet this requirement.

**Required Activities**

- |  |  |   |   |
|--|--|---|---|
| <p>1. (Per Sec. 3116(b) of NCLB, this Plan must include the following:</p> <p>4. Describe the programs and activities to be developed, implemented, and administered under the sub grant;</p> <p>5. Describe how the LEA will use the sub grant funds to meet all annual measurable achievement objectives described in Section 3122;</p> <p>6. Describe how the LEA will hold elementary and secondary schools receiving funds under this subpart accountable for:</p> <ul style="list-style-type: none"> <li>■ meeting the annual measurable achievement objectives described in Section 3122;</li> <li>■ making adequate yearly progress for limited-English-proficient students (Section 1111(b)(2)(B));</li> <li>■ annually measuring the English proficiency of LEP students so that the students served develop English proficiency while meeting State Academic standards and student achievement (Section 1111(b)(1));</li> </ul> <p>7. Describe how the LEA will promote parental and community participation in LEP programs.</p> | <p>1. a b MONSEÑOR OSCAR ROMERO CHARTER will incorporate an ELD program that will target students who are struggling with the development of their English language skills that will include:</p> <ul style="list-style-type: none"> <li>⤴ Ongoing measurement of each LEP student’s progress toward English language proficiency, through the use of ELD portfolios.</li> <li>⤴ Use of Ellevation Program Management Platform assist LEP students.</li> <li>⤴ Ongoing professional development in the area of sheltered instruction for all subject area teachers, primarily using the SIOP model.</li> <li>⤴ Opportunities for ELD level 1 and 2 students to receive additional instructional support after school.</li> </ul> <p>c. Title III funding from the federal government to help English learners to speak, read, and write in English and to achieve in reading and mathematics. MONSEÑOR OSCAR ROMERO CHARTER receives Title III funds that are reviewed each year, as required under the ESSA, to see if they meet the three Annual Measurable Achievement Objectives (AMAOs) for our English learners:</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b>AMAO's</b></p> <p>Progress in Learning English</p> <ul style="list-style-type: none"> <li>⤴ Increase One Proficiency Level</li> <li>⤴ Early Advanced and Advanced must reach English Proficient level bringing all skills to Intermediate Level.</li> <li>⤴ English Proficient levels are expected to maintain that level.</li> </ul> <p>Progress in the percentage of students who become proficient in English.</p> <p>Academic targets in English-language arts and mathematics</p> <ul style="list-style-type: none"> <li>☑ Participation Rate</li> <li>☑ Percentage Proficient or Above</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <p><b>Measurable Goals</b></p> <ul style="list-style-type: none"> <li>⤴ Administer the ELPAC to ascertain the level of proficiency.</li> <li>⤴ Conduct analysis of EL’s using ELSSA.</li> <li>⤴ Identify factors that contribute to meeting or not meeting AMAO’s.</li> <li>⤴ Use MONSEÑOR OSCAR ROMERO CHARTER English Learner Plan of Action-Visited yearly and/or on an ongoing basis.</li> <li>⤴ Work with teachers, parents and staff to provide services.</li> </ul> <p>Increase English Learner redesignation ratio yearly. Continue to Monitor students who have been redesignated and work with students at each level.</p> <p>Monitor and assist EL students to meet academic targets in English Language Arts, and Mathematics (Increasing yearly)</p> </td> </tr> </table> <p>d. Holding quarterly meetings with parents to discuss each student’s progress toward English language proficiency. ELAC/PAC provides leadership for our EL students.</p> | <p><b>AMAO's</b></p> <p>Progress in Learning English</p> <ul style="list-style-type: none"> <li>⤴ Increase One Proficiency Level</li> <li>⤴ Early Advanced and Advanced must reach English Proficient level bringing all skills to Intermediate Level.</li> <li>⤴ English Proficient levels are expected to maintain that level.</li> </ul> <p>Progress in the percentage of students who become proficient in English.</p> <p>Academic targets in English-language arts and mathematics</p> <ul style="list-style-type: none"> <li>☑ Participation Rate</li> <li>☑ Percentage Proficient or Above</li> </ul> | <p><b>Measurable Goals</b></p> <ul style="list-style-type: none"> <li>⤴ Administer the ELPAC to ascertain the level of proficiency.</li> <li>⤴ Conduct analysis of EL’s using ELSSA.</li> <li>⤴ Identify factors that contribute to meeting or not meeting AMAO’s.</li> <li>⤴ Use MONSEÑOR OSCAR ROMERO CHARTER English Learner Plan of Action-Visited yearly and/or on an ongoing basis.</li> <li>⤴ Work with teachers, parents and staff to provide services.</li> </ul> <p>Increase English Learner redesignation ratio yearly. Continue to Monitor students who have been redesignated and work with students at each level.</p> <p>Monitor and assist EL students to meet academic targets in English Language Arts, and Mathematics (Increasing yearly)</p> |
| <p><b>AMAO's</b></p> <p>Progress in Learning English</p> <ul style="list-style-type: none"> <li>⤴ Increase One Proficiency Level</li> <li>⤴ Early Advanced and Advanced must reach English Proficient level bringing all skills to Intermediate Level.</li> <li>⤴ English Proficient levels are expected to maintain that level.</li> </ul> <p>Progress in the percentage of students who become proficient in English.</p> <p>Academic targets in English-language arts and mathematics</p> <ul style="list-style-type: none"> <li>☑ Participation Rate</li> <li>☑ Percentage Proficient or Above</li> </ul>  | <p><b>Measurable Goals</b></p> <ul style="list-style-type: none"> <li>⤴ Administer the ELPAC to ascertain the level of proficiency.</li> <li>⤴ Conduct analysis of EL’s using ELSSA.</li> <li>⤴ Identify factors that contribute to meeting or not meeting AMAO’s.</li> <li>⤴ Use MONSEÑOR OSCAR ROMERO CHARTER English Learner Plan of Action-Visited yearly and/or on an ongoing basis.</li> <li>⤴ Work with teachers, parents and staff to provide services.</li> </ul> <p>Increase English Learner redesignation ratio yearly. Continue to Monitor students who have been redesignated and work with students at each level.</p> <p>Monitor and assist EL students to meet academic targets in English Language Arts, and Mathematics (Increasing yearly)</p>  |   |   |

**Planned Improvement in Programs for LEP Students and Immigrants (Title III)**

(Summarize information from district-operated programs and approved school-level plans)

Description of how the LEA is meeting or plans to meet this requirement.

R 1. (Per Sec. 3116(b) of NCLB, this Plan must include the following:

- 8. Describe the programs and activities to be developed, implemented, and administered under the sub grant;
- 9. Describe how the LEA will use the sub grant funds to meet all annual measurable achievement objectives described in Section 3122;
- 10. Describe how the LEA will hold elementary and secondary schools receiving funds under this subpart accountable for:
  - meeting the annual measurable achievement objectives described in Section 3122;
  - making adequate yearly progress for limited-English-proficient students (Section 1111(b)(2)(B));
  - annually measuring the English proficiency of LEP students so that the students served develop English proficiency while meeting State Academic standards and student achievement (Section 1111(b)(1));
- 11. Describe how the LEA will promote parental and community participation in LEP programs.

**Monseñor Oscar Romero Charter** will incorporate an ELD program that will target students who are struggling with the development of their English language skills that will include:

- 1. Ongoing measurement of each LEP (English Learner/EL) student’s progress toward English language proficiency, through the use of ELD portfolios.
- 2. Use of CA Common Core ELD materials to assist EL students.
- 3. . Ongoing professional development in the area of sheltered instruction for all subject area teachers, primarily using the SIOP model.
- 4. Opportunities for ELD level 1 and 2 students to receive additional instructional support after school.
- 5. Holding quarterly meetings with parents to discuss each student’s progress toward English language proficiency.



2. Describe how the LEA will provide high quality language instruction based on scientifically based research (per Sec. 3115(c) .

The effectiveness of the LEP programs will be determined by the increase in:

- English proficiency; and
- Academic achievement in the core academic subjects

1. The designated ELD Coordinator will provide mentoring to all subject level teachers and will assist teachers in developing lesson plans that incorporate appropriate language goals for EL students.
2. The staff will discuss research- based literature related to best teaching practices in ELD instruction on an ongoing basis.

Required Activities		Description of how the LEA is meeting or plans to meet this requirement.
	<p>3. Provide high quality professional development for classroom teachers, Executive Administrator s, administrators, and other school or community-based personnel.</p> <ul style="list-style-type: none"> <li>a. designed to improve the instruction and assessment of LEP children;</li> <li>b. designed to enhance the ability of teachers to understand and use curricula, assessment measures, and instruction strategies for limited-English-proficient students;</li> <li>c. based on scientifically based research demonstrating the effectiveness of the professional development in increasing children’s English proficiency or substantially increasing the teachers’ subject matter knowledge, teaching knowledge, and teaching skills;</li> <li>d. long term effect will result in positive and lasting impact on teacher performance in the classroom.</li> </ul>	<p>1. The Executive Administrator and the teachers will participate in professional development workshops provided by our designated ELD coordinator and through various educational organizations. Professional development activities chosen will instruct staff and teachers in the methods of incorporating research-based methodology proven to enable EL students to improve both their English language proficiency and their mastery of content standards.</p> <p>2. Our designated ELD coordinator will attend seminars, conferences and training sessions in order to keep current with the research on EL students.</p>

Allowable Activities	4. Upgrade program objectives and effective instruction strategies.	<p><b>Yes or No</b>                  No                  No</p>	<p><b>If yes, describe:</b></p>
Description of how the LEA is meeting or plans to meet this requirement.			
Allowable Activities	<p>5. Provide –</p> <ul style="list-style-type: none"> <li>a. tutorials and academic or vocational education for LEP students; and</li> <li>b. intensified instruction.</li> </ul>	<p><b>Yes or No</b>                  Yes</p>	<p><b>If yes, describe:</b></p> <p><b>Monseñor Oscar Romero Charter</b> will use the designated ELD coordinator to provide additional tutoring and accelerated instruction for our EL students.</p>

6. Develop and implement programs that are coordinated with other relevant programs and services.

**Yes or No**  
Yes

**If yes, describe:**

- ⤴ Explicit Direct Instruction (EDI) will be used as an ELD program and an intervention program for our students scoring below basic on the Smarter Balanced assessment.
- ⤴ An ELD based writing program will be implemented school-wide. (In progress)
- ⤴ The SDAIE/SIOP model will be used as a means for daily planning as well as assessment of all of our teachers' performance.

7. Improve the English proficiency and academic achievement of LEP children.

**Yes or No**  
Yes

**If yes, describe:**

1. Teachers will use methodology learned about in professional development workshops and will work collaboratively across disciplines to improve English proficiency and academic achievement of EL students.
2. The faculty will adopt a school-wide literacy plan that targets at least seven language objectives, and those objectives will be modified based on students' ELD levels.

Allowable Activities		Yes or No	Description of how the LEA is meeting or plans to meet this requirement.
	<p>8. Provide community participation programs, family literacy services, and parent outreach and training activities to LEP children and their families –</p> <ul style="list-style-type: none"> <li>⌘ To improve English language skills of LEP children; and</li> <li>⌘ To assist parents in helping their children to improve their academic achievement and becoming active participants in the education of their children.</li> </ul>	Yes or No	<p><b>If yes, describe:</b></p> <ol style="list-style-type: none"> <li>1. <b>Monseñor Oscar Romero Charter</b> will invite parents to the School Advisory Committee that will meet regularly to advise the Executive Administrator regarding the school’s ELD program.</li> <li>2. The PAC, in conjunction with the designated ELD coordinator, will hold parent-training sessions on how to best support their child’s instruction at home.</li> </ol>
	<p>9. Improve the instruction of LEP children by providing for –</p> <ul style="list-style-type: none"> <li>• The acquisition or development of educational technology or instructional materials</li> <li>• Access to, and participation in, electronic networks for materials, training, and communication; and</li> <li>• Incorporation of the above resources into curricula and programs.</li> </ul>	<p><b>Yes or No</b> Yes</p>	<p><b>If yes, describe</b></p> <p>The school will be purchasing language development software that will be available in the computer lab (in process). Instructional materials that will assist the teacher in enabling the students to reach their language and academic goals will be purchased. Success For All, Ellevation, and other program platforms</p> <p>Monitoring of the incorporation of these resources will take place through assessments, observations and discussions during staff meetings.</p>
	<p>10. Other activities consistent with Title III.</p>	<p><b>Yes or No</b> No</p>	<p><b>If yes, describe:</b></p>

**Plans to Notify and Involve Parents of Limited-English-Proficient Students**

**Parents of Limited-English-Proficient students must be notified:** The outreach efforts include holding and sending notice of opportunities for regular meetings for the purpose of formulating and responding to recommendations from parents

Description of how the LEA is meeting or plans to meet this requirement.

Required Activity

1. LEA informs the parent/s of an LEP student of each of the following (per Sec. 3302 of NCLB):  
the reasons for the identification of their child as LEP and in need of placement in a language instruction educational program;  
the child's level of English proficiency, how such level was assessed, and the status of the student's academic achievement;  
the method of instruction used in the program in which their child is or will be, participating, and the methods of instruction used in other available, programs, including how such programs differ in content, instruction goals, and use of English and a native language in instruction; how the program in which their child is, or will be participating will meet the educational strengths and needs of the child;  
how such program will specifically help their child learn English, and meet age appropriate academic achievement standards for grade promotion and graduation;  
the specific exit requirements for such program, the expected rate of transition from such program into classrooms that are not tailored for limited English proficient children, and the expected rate of graduation from secondary school for such program if funds under this title are used for children in secondary schools;  
in the case of a child with a disability, how such program meets the objectives of the individualized education program of the child;

1. The school will hold meetings with parents to discuss all aspects of identification, assessment, instruction, benefits, and exit requirements at our Parent/Student Orientations held in June and July, September Back to School Night. Parents of EL students with an IEP will be informed about the effectiveness of the plan to meet all associated goals and objectives.

Description of how the LEA is meeting or plans to meet this requirement.

Required Activity

information pertaining to parental rights that includes written guidance detailing – the right that parents have to have their child immediately removed from such program upon their request; and the options that parents have to decline to enroll their child in such program or to choose another program or method of instruction, if available; the LEA assists parents in selecting among various programs and methods of instruction, if more than one program or method is offered by the LEA.

Parents will be informed of the rights to remove their child from the program, not to enroll their child, and their choice of instructional methods for their child at our September Open House.

**Note:** Notifications must be provided to parents of students enrolled since the previous school year: not later than 30 days after the beginning of the schools year. If students enroll after the beginning of the school year, parents must be notified within two weeks of the child being placed in such a program.

LEA Parent Notification Failure to Make Progress

If the LEA fails to make progress on the annual measurable achievement objectives it will inform parents of a child identified for participation in such program, or participation in such program, of such failure not later than 30 days after such failure occurs.

EL families will be provided with: 1) regular, periodic information about their child’s academic progress at school, 2) their child’s progress in acquiring English as measured by the ELPAC, 3) their child’s progress in meeting California standards in academic subjects as measured by the Smarter Balanced Assessment in English Language Arts.



Required Reclassification Assessments

Name of Student: \_\_\_\_\_ Date: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_ Teacher: \_\_\_\_\_

Assessment Requirement \_\_\_\_\_ Data Source \_\_\_\_\_

ELPAC Proficiency Level \_\_\_\_\_ English Language \_\_\_\_\_ Date: \_\_\_\_\_

Early Advance  Advance  Development Standards Initials: \_\_\_\_\_

Teacher Observation \_\_\_\_\_ Assessment \_\_\_\_\_ Date: \_\_\_\_\_

19 points or higher

Total Points: \_\_\_\_\_ Initials: \_\_\_\_\_

English/Language Arts \_\_\_\_\_ Approved California Smarter Balanced Score: \_\_\_\_\_  
Basic or Above \_\_\_\_\_ Standards Test

Report Card Grades \_\_\_\_\_ "C" or better

English/Language Arts: \_\_\_\_\_

(Equivalent to "C" average)

Parent Notification \_\_\_\_\_ Telephone Date: \_\_\_\_\_ Conference Date: \_\_\_\_\_

Letter Sent: \_\_\_\_\_

Follow-Up Dates \_\_\_\_\_ 30 \_\_\_\_\_

1<sup>st</sup> Quarter: \_\_\_\_\_ 2<sup>nd</sup> Quarter: \_\_\_\_\_ 3<sup>rd</sup> Quarter: \_\_\_\_\_ 4<sup>th</sup> Quarter: \_\_\_\_\_

Alternate Reclassification  Date: \_\_\_\_\_ Reclassification

Approved  Reclassification Denied  \*(See inside folder for rationale)

Required Reclassification Assessments

Name of Student: \_\_\_\_\_ Date: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_ Teacher: \_\_\_\_\_

Assessment Requirement \_\_\_\_\_ Data Source \_\_\_\_\_

ELPAC Proficiency Level \_\_\_\_\_ English Language \_\_\_\_\_ Date: \_\_\_\_\_

Early Advance  Advance  Development Standards Initials: \_\_\_\_\_

Teacher Observation \_\_\_\_\_ Assessment \_\_\_\_\_ Date: \_\_\_\_\_

19 points or higher  
Total Points: \_\_\_\_\_ Initials: \_\_\_\_\_

English/Language Arts \_\_\_\_\_ Approved California Smarter Balanced Score: \_  
Basic or Above \_\_\_\_\_ Standards Test

Report Card Grades \_\_\_\_\_ C or better English/Language Arts:  
\_\_\_\_\_

Parent Notification \_\_\_\_\_ Telephone Date: \_\_\_\_\_ Conference Date: \_\_\_\_\_

Letter Sent: \_\_\_\_\_

Follow-Up Dates \_\_\_\_\_ 30 \_\_\_\_\_

1<sup>st</sup> Quarter: \_\_\_\_\_ 2<sup>nd</sup> Quarter: \_\_\_\_\_ 3<sup>rd</sup> Quarter: \_\_\_\_\_ 4<sup>th</sup> Quarter: \_\_\_\_\_

Alternate Reclassification  Date: \_\_\_\_\_ Reclassification

Approved  Reclassification Denied  \*(See inside folder for rationale)

### Reclassification Form for English Learners

Student Name: \_\_\_\_\_ Birthday: \_\_\_\_\_

Date of ELAC Meeting: \_\_\_\_\_ Grade: \_\_\_\_\_

**Student Performance:**

Assessment	Date	Score	Required Score
1. Smarter Balanced Achievement Level – ELA/i-Ready ELA RIT			(i-Ready) 212 or higher RIT (SBAC) Upper Level 2 or higher Upper Nearly Met Standards or higher
2.ELPAC– Overall Proficiency			4 or 5
3.ELPAC– Listening			3, 4, or 5
4. ELPAC – Speaking			3, 4, or 5
5. ELPAC- Reading			3, 4, or 5
6. ELPAC– Writing			3, 4, or 5
7. Academic Performance			Grade of C or higher in English – Language Arts

**Reclassification Committee Recommendation:**  Yes  No

Student has acquired sufficient English language fluency and academic skills to succeed in an English-only program.

**Action Taken:**

\_\_\_\_\_ Student meets the district’s reclassification criteria.

\_\_\_\_\_ Student does not meet the district’s reclassification criteria.

Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Executive Administrator Signature: \_\_\_\_\_

Committee’s Signature: \_\_\_\_\_

Teacher’s Signature: \_\_\_\_\_

Parent’s Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Reclassification 2021-2022

Table 1.1: English Language Acquisition Status (ELAS) and Grade

Grade	Total	English Only (EO)	Initial Fluent English Proficient (IFEP)	English Learner (EL)	Reclassified Fluent English Proficient (RFEP)	To Be Determined (TBD)
06	87	5.7%	8.0%	48.3%	37.9%	0.0%
07	91	8.8%	6.6%	39.6%	45.1%	0.0%
08	117	9.4%	5.1%	34.2%	51.3%	0.0%

Table 1.2: English Language Acquisition Status (ELAS)

Name	Total	English Only (EO)	Initial Fluent English Proficient (IFEP)	English Learner (EL)	Reclassified Fluent English Proficient (RFEP)	To Be Determined (TBD)
<a href="#">Monseñor Oscar Romero Charter Middle</a>	295	8.1%	6.4%	40.0%	45.4%	0.0%
<a href="#">Los Angeles Unified</a>	548,338	46.3%	7.0%	21.3%	25.0%	0.4%
<a href="#">Los Angeles County</a>	1,336,558	54.8%	6.2%	18.5%	20.1%	0.3%
<a href="#">State</a>	5,892,240	59.6%	4.6%	19.1%	16.3%	0.3%

Data Reporting Office  
 California Department of Education  
 1430 N Street  
 Sacramento, CA 95814  
[DRO@CDE.CA.Gov](mailto:DRO@CDE.CA.Gov) | [Web Policy](#)

## Reclassification

**Table 1.1: English Language Acquisition Status (ELAS) and Grade 2022-23**

Grade	Total	English Only (EO)	Initial Fluent English Proficient (IFEP)	English Learner (EL)	Reclassified Fluent English Proficient (RFEP)	To Be Determined (TBD)
06	94	13.8%	3.2%	38.3%	44.7%	0.0%
07	97	7.2%	8.2%	45.4%	39.2%	0.0%
08	86	5.8%	5.8%	34.9%	53.5%	0.0%

CDE Dataquest 2023-English Learner

**Table 1.2: English Language Acquisition Status (ELAS)**

Name	Total	English Only (EO)	Initial Fluent English Proficient (IFEP)	English Learner (EL)	Reclassified Fluent English Proficient (RFEP)	To Be Determined (TBD)
<a href="#">Monseñor Oscar Romero Charter Middle</a>	277	9.0%	5.8%	39.7%	45.5%	0.0%
<a href="#">Los Angeles Unified</a>	538,295	47.7%	6.6%	21.3%	24.2%	0.3%
<a href="#">Los Angeles County</a>	1,313,935	55.9%	6.0%	18.5%	19.4%	0.2%
<a href="#">State</a>	5,852,544	60.1%	4.6%	19.0%	15.9%	0.3%

CDE Dataquest 2023-English Learner [DRO@CDE.CA.Gov](mailto:DRO@CDE.CA.Gov)

**Table 1.3: “At-Risk” and Long-Term English Learners (LTEL) By Grade**

Grade	English Learners				EL Total	RFEP	Total (Ever-EL)
	EL 0-3 Years	At-Risk 4-5 Years	LTEL 6+ Years	EL 4+ Years Not At-Risk or LTEL			
06	4	1	15	16	36	42	78
07	5	3	13	23	44	38	82
08	9	0	11	10	30	46	76

<https://dq.cde.c.gov/dataquest/longtermel/EverELType.aspx?cds=19647330114959&aglevel=School&year=2022-23>

Table 1.4: “At-Risk” and Long-Term English Learners (LTEL)

Level	English Learners				EL Total	RFEP	Total (Ever-EL)
	EL 0-3 Years	At-Risk 4-5 Years	LTEL 6+ Years	EL 4+ Years Not At-Risk or LTEL			
<a href="#">Monseñor Oscar Romero Charter Middle</a>	18	4	39	49	110	126	236
<a href="#">Los Angeles Unified</a>	60,457	17,295	17,921	18,850	114,523	130,377	244,900
<a href="#">Los Angeles County</a>	116,985	32,395	44,482	48,822	242,684	254,511	497,195
<a href="#">State</a>	505,487	144,190	226,535	236,323	1,112,535	927,723	2,040,258

**\*Note:** The “EL Total” column in this report displays the summed total of the disaggregated English Learner (EL) data in the four columns under the “English Learners” heading. The “Total (Ever-EL)” column displays the summed total of the data in the “RFEP” column plus the data in the four columns under the “English Learners” heading OR the data in the “EL Total” column, but not both. To view the data in this report as percentages, including “At-Risk” and “LTEL” percentages, select “Percents” from the View Data As menu option located above the report. The percent values displayed in this report are calculated as a percent of the “Total (Ever-EL)” which fully and more accurately considers what happens to all EL students over time, including those who are Reclassified Fluent English Proficient (RFEP).



**FIXED TERM EMPLOYMENT AGREEMENT**  
**Between**  
**YOUTH POLICY INSTITUTE CHARTER SCHOOLS & «Name»**

THIS EMPLOYMENT AGREEMENT (“Agreement”) is entered into by and between the above-named employee (“Employee”) and the Governing Board (“Board”) of Youth Policy Institute Charter Schools (“YPICS”), a California nonprofit public benefit corporation operating public charter schools approved by the Los Angeles Unified School District (“District”). The Board desires to hire employees who will assist YPICS in implementing its purposes, policies, and procedures, and in achieving the goals and meeting the requirements of YPICS’s charter. The parties recognize that YPICS is not governed by the provisions of the California Education Code, except as expressly set forth in the Charter Schools Act of 1992.

WHEREAS, YPICS and the Employee wish to enter into an employment relationship under the conditions set forth herein, the parties hereby agree as follows:

**A. STATUTORY PROVISIONS RELATING TO CHARTER SCHOOL EMPLOYMENT**

1. YPICS operates charter schools that have been established pursuant to the Charter Schools Act of 1992, Education Code section 47600, *et seq.*, and which have been duly approved by the District, according to the laws of the State of California.
2. Pursuant to Education Code section 47604, YPICS has elected to be formed and to operate as a nonprofit public benefit corporation pursuant to the Non-profit Public Benefit Corporation Law of California (Part 2, commencing with section 5110 *et seq.* of the Corporations Code). As such, YPICS is considered a separate legal entity from the District, which granted the charters. The District shall not be liable for any debts and obligations of YPICS, and the employee signing below expressly recognizes that he/she is being employed by YPICS and not the District.
3. Pursuant to Education Code section 47610, YPICS must comply with all of the provisions set forth in its operative charters, but is otherwise exempt from the laws governing school districts except as specified in Education Code section 47610.
4. YPICS shall be deemed the exclusive public school employer of the employees at YPICS for purposes of Government Code section 3540.1.

**B. EMPLOYMENT TERMS AND CONDITIONS**

1. **Duties**

The Employee shall work in the position of «**Position**» at «**School**». The Employee will perform such duties as YPICS may reasonably assign and the Employee will abide by all YPICS policies and procedures as adopted and amended from time to time. The Employee further agrees to abide by the provisions of YPICS’s charter. A copy of the

job description for the above position is attached hereto and incorporated by reference herein. These duties may be amended from time to time in the sole discretion of YPICS.

2. **Work Schedule**

The minimum on-site obligations for this position shall generally be «**Schedule**». While the Employee shall be available on-site during this time period, the duties of this exempt position may require work on weekends, as well as before and after the regular work year or hours of the workday. Workdays on which the Employee is expected to be on-site shall be consistent with the applicable calendar of workdays for this position. The current year schedule is attached hereto and incorporated by reference herein. The Employee will not render services in person or by electronic means, paid or otherwise, for any other person or entity during contracted work hours with YPICS.

The Employee is required to work during Professional Development days, Parent Conference days, Back to School Night, Promotion/Culmination/Graduation, Grade Level Parent/Student Orientations, and Presentations of Learning. Additionally, the Employee is required to attend YPICS-sponsored special events, such as night performances, student activities or other similar activities that could occur in the evenings or on the weekends. The Employee is also required to participate on a School committee and attend events planned by the committee (minimum of two [2] events per semester).

The Employee must attend the above-mentioned YPICS-sponsored events unless the Employee obtains advance written permission from YPICS's Executive Administrator to miss an event due to compelling circumstances. YPICS's Executive Administrator shall have complete discretion to grant or deny such a request. YPICS reserves the right to require the Employee to attend a specific special event.

3. **Compensation**

The annual compensation for this position shall be \$«**Salary**», to be paid twice monthly, subject to all regular withholdings. The Employee's compensation may be prorated depending on whether the Employee remains employed, or in active work status, for the entire year. As an exempt employee, the Employee shall not be eligible to earn overtime.

4. **Employee Benefits**

The Employee shall be entitled to participate in designated employee benefit programs and plans established by YPICS (subject to program and eligibility requirements) for the benefit of its employees, which from time to time may be modified by YPICS in its sole discretion.

5. **Performance Evaluation**



The Employee shall receive periodic performance reviews conducted by his/her supervisor. At a minimum, performance evaluations will be conducted annually, on or about the anniversary date of employment with YPICS. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems. Failure to evaluate the Employee shall not prevent YPICS from disciplining or dismissing the Employee in accordance with this Agreement.

6. **Employee Rights**

Employment rights and benefits for employment at YPICS shall only be as specified in this Agreement, YPICS's charters, the Charter Schools Act, and YPICS's Employee Handbook, which YPICS may amend and modify from time to time. Employment rights and benefits may be affected by other applicable agreements or directives or advisories from the California Department of Education or the State Board of Education. During the term of this Agreement, the Employee shall not acquire or accrue tenure, or any employment rights with YPICS.

7. **Licensure**

The Employee understands that employment is contingent upon verification and maintenance of any applicable licensure and/or credentials.

8. **Child Abuse and Neglect Reporting**

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his/her professional capacity or within the scope of his/her employment whom he/she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident. By executing this Agreement, the Employee acknowledges he/she is a child care custodian and is certifying that he/she has knowledge of California Penal Code section 11166 and will comply with its provisions.

9. **Fingerprinting/TB Clearance**

Fingerprint clearance for the Employee will be acquired through submitting the Employee's fingerprints to the California Department of Justice. The Employee will be required to assume the cost of all fees related to the fingerprinting process. The Employee will be required to submit evidence from a health care provider that the Employee was found to be free from tuberculosis risk factors, or active tuberculosis if risk factors were identified. Both clearances must be in place prior to the first day of service.

10. **Conflicts of Interest**

The Employee understands that, while employed at YPICS, he/she will have access to confidential and proprietary information. The Employee therefore shall not maintain employment or contracts for employment, or engage in any consultant or independent contractor relationship, with any other agency or school that will in any way conflict with his/her employment with YPICS.

#### 11. **Outside Professional Activities**

Upon obtaining prior written approval of the Executive Director, the Employee may undertake for consideration outside professional activities, including consulting, speaking, and writing. The outside activities shall not occur during regular work hours. YPICS shall in no way be responsible for any expenses attendant to the performance of such outside activities.

### C. **TERMINATION OF AGREEMENT**

This Agreement may be terminated by any of the following:

1. **At-Will:** During the first ninety (90) days of employment pursuant to this Agreement, either YPICS or the Employee may terminate the employment relationship at any time, with or without cause or advance notice. The Employee also may be demoted or disciplined and the terms of his/her employment may be altered at any time, with or without cause, at the discretion of YPICS. No one other than the Board has the authority to alter this arrangement, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to the terms of this Agreement, and any such agreement must be in writing and must be signed by the Board and by the affected employee and must specifically state the intention to alter this “at-will” relationship during the first ninety (90) days of employment pursuant to this Agreement.
2. **Termination For Cause:** YPICS may terminate this Agreement for “cause” at any time. “Cause” includes, but is not limited to, the following: a) failure to satisfactorily fulfill job requirements; b) violation of this Agreement, the Employee Handbook, or any other YPICS policies/procedures; c) reductions in force due to lack of work/funds; d) inability of the Employee to perform the essential functions of the position, with or without a reasonable accommodation, due to a physical or mental disability after exhausting available leave benefits; or e) YPICS’s receipt of a notification from the California Department of Justice that the Employee is not authorized or fit to work with children in the discretion of YPICS. In the event that YPICS terminates this Agreement for cause, the Employee shall receive written notice of the basis for the termination and payment through the termination date.
3. **Early Termination without Cause:** YPICS may unilaterally terminate this Agreement without cause. In consideration of YPICS’s right to terminate this Agreement without cause, the Employee shall receive the remainder of his/her salary (based upon any remaining calendared work days) for the term of this Agreement or for a period of one (1) calendar month following the effective date of termination, whichever is less.

4. **Revocation/Nonrenewal of Charter:** In the event that the YPICS charter with the District is either revoked or nonrenewed, this Agreement shall terminate immediately upon the effective date of the revocation/nonrenewal of the charter.
5. **Death or Incapacitation of Employee:** The death of Employee shall terminate this Agreement and all rights provided under this Agreement. In the event that Employee becomes incapacitated to the extent that, in the judgment of YPICS, Employee may no longer perform the essential functions of his/her job with or without reasonable accommodation, as set forth in the job specifications, YPICS may terminate this Agreement.

**D. NON-RENEWAL/EXPIRATION OF TERM.** YPICS may elect not to offer future employment agreements to Employee at its sole discretion, without cause, and this Agreement will lapse by its own terms. YPICS shall endeavor to provide notice of non-renewal by May 30. The Employee is requested to notify YPICS in writing by March 15 of any intent not to return.

**E. CONFIDENTIALITY OF INFORMATION POLICY**

During employment, the Employee may have access to and/or become aware of information of a confidential, proprietary, or private nature (“Confidential Information”). For purposes of this policy, “Confidential Information” includes, but is not limited to, information and data relating to YPICS’s students, non-public YPICS budget or financial information, and payroll and personnel information relating to current or former employees.

At all times during and after employment with YPICS, the Employee is required to hold all Confidential Information in trust and keep Confidential Information confidential. Additionally, the Employee must comply with all confidentiality-related obligations imposed by the Family Educational Rights and Privacy Act (FERPA).

During employment with YPICS, the Employee may use Confidential Information or disclose Confidential Information to a third party only: (1) as reasonably required in the course of employment with YPICS; (2) as permitted with the prior written consent of YPICS; or (3) as may otherwise be required by law. If the Employee is in doubt about whether information should be disclosed or used, Employee should discuss the situation with the YPICS School Executive Administrator or the Executive Director before disclosing or using the information.

The Employee’s obligations under this Confidentiality of Information policy remain in effect even after his or her employment relationship with YPICS ends. After separation of employment, the Employee may not use or disclose Confidential Information to any third party unless required to do so by law. Upon separation of employment, the Employee must immediately return to YPICS any and all documents, computer or electronic files, printouts, copies, or other information containing Confidential Information in the Employee’s possession, custody or control. If the Employee is requested to disclose Confidential Information to a third party in a subpoena or similar type of request, the Employee shall give written notice to the current YPICS School Executive Administrator of such request as soon as is reasonably possible and at least five (5) business days prior to the Employee making any such disclosures.

By signing below, the Employee certifies that he or she understands and agrees to abide by this Confidentiality of Information policy.

**F. GENERAL PROVISIONS**

1. **Waiver of Breach**

The waiver by either party, or the failure of either party to claim a breach of any provision of this Agreement, will not operate or be construed as a waiver of any subsequent breach.

2. **Assignment**

The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the heirs, legal representatives, successors and assigns of the parties hereto; provided, however, that this Agreement will not be assignable by either party without prior written consent of the other party.

3. **Governing Law**

This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of California.

4. **Partial Invalidity**

If any provision of this Agreement is found to be invalid or unenforceable by any court, the remaining provisions hereof will remain in effect unless such partial invalidity or unenforceability would defeat an essential business purpose of the Agreement.

**G. ACCEPTANCE OF EMPLOYMENT**

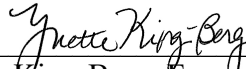
By signing below, the Employee declares as follows:

1. I have read this Agreement and accept employment with YPICS on the terms specified herein.
2. All information I have provided to YPICS related to my employment is true and accurate.
3. A copy of the job description is attached hereto.
4. This is the entire agreement between YPICS and me regarding the terms and conditions of my employment. This is a final and complete agreement and there are no other agreements, oral or written, express or implied, concerning the subject matter of this Agreement.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**YPICS Approval:**

Date: 01/18/2023

  
\_\_\_\_\_  
Yvette King-Berg, Executive Director

***This Employment Agreement is subject to ratification  
and approval by the Governing Board of YPICS.***



**FIXED TERM EMPLOYMENT AGREEMENT**  
**Between**  
**YOUTH POLICY INSTITUTE CHARTER SCHOOLS & «Name»**

THIS EMPLOYMENT AGREEMENT (“Agreement”) is entered into by and between the above-named employee (“Employee”) and the Governing Board (“Board”) of Youth Policy Institute Charter Schools (“YPICS”), a California nonprofit public benefit corporation operating public charter schools approved by the Los Angeles Unified School District (“District”). The Board desires to hire employees who will assist YPICS in implementing its purposes, policies, and procedures, and in achieving the goals and meeting the requirements of YPICS’s charter. The parties recognize that YPICS is not governed by the provisions of the California Education Code, except as expressly set forth in the Charter Schools Act of 1992.

WHEREAS, YPICS and the Employee wish to enter into an employment relationship under the conditions set forth herein, the parties hereby agree as follows:

**A. STATUTORY PROVISIONS RELATING TO CHARTER SCHOOL EMPLOYMENT**

1. YPICS operates charter schools that have been established pursuant to the Charter Schools Act of 1992, Education Code section 47600, *et seq.*, and which have been duly approved by the District, according to the laws of the State of California.
2. Pursuant to Education Code section 47604, YPICS has elected to be formed and to operate as a nonprofit public benefit corporation pursuant to the Non-profit Public Benefit Corporation Law of California (Part 2, commencing with section 5110 *et seq.* of the Corporations Code). As such, YPICS is considered a separate legal entity from the District, which granted the charters. The District shall not be liable for any debts and obligations of YPICS, and the employee signing below expressly recognizes that he/she is being employed by YPICS and not the District.
3. Pursuant to Education Code section 47610, YPICS must comply with all of the provisions set forth in its operative charters, but is otherwise exempt from the laws governing school districts except as specified in Education Code section 47610.
4. YPICS shall be deemed the exclusive public school employer of the employees at YPICS for purposes of Government Code section 3540.1.

**B. EMPLOYMENT TERMS AND CONDITIONS**

1. **Duties**

The Employee shall work in the position of «**Position**» at «**School**». The Employee will perform such duties as YPICS may reasonably assign and the Employee will abide by all YPICS policies and procedures as adopted and amended from time to time. The Employee further agrees to abide by the provisions of YPICS’s charter. A copy of the

job description for the above position is attached hereto and incorporated by reference herein. These duties may be amended from time to time in the sole discretion of YPICS.

2. **Work Schedule**

The work schedule for this position shall be «**Part\_or\_Full**» consisting of «**Schedule**». The Employee is prohibited from working hours in excess of this work schedule, including overtime, without the prior written consent of YPICS. Workdays for the Employee shall be consistent with the applicable calendar of workdays for this position. The current year schedule is attached hereto and incorporated by reference herein. The Employee will not render services in person or by electronic means, paid or otherwise, for any other person or entity during contracted work hours with YPICS.

The Employee may be required to work during Professional Development days, Parent Conference days, Back to School Night, Promotion/Culmination/Graduation, Grade Level Parent/Student Orientations, and Presentations of Learning. Additionally, the Employee may be required to attend YPICS-sponsored special events, such as night performances, student activities or other similar activities that could occur in the evenings or on the weekends. The Employee may be required to participate on a School committee and attend events planned by the committee (minimum of two [2] events per semester).

The Employee, if required, must attend the above-mentioned YPICS-sponsored events unless the Employee obtains advance, written permission from YPICS's Executive Administrator to miss an event due to compelling circumstances, and YPICS's Executive Administrator shall have complete discretion to grant or deny such a request. YPICS reserves the right to require the Employee to attend a specific special event.

3. **Compensation**

The hourly pay for this position is \$«**Hourly\_Rate**», subject to all regular withholdings. The Employee shall be paid twice monthly. The Employee shall not be permitted to earn overtime compensation without the prior written consent of YPICS.

4. **Employee Benefits**

The Employee shall be entitled to participate in designated employee benefit programs and plans established by YPICS (subject to program and eligibility requirements) for the benefit of its employees, which from time to time may be modified by YPICS in its sole discretion.

5. **Performance Evaluation**

The Employee shall receive periodic performance reviews conducted by his/her supervisor. At a minimum, performance evaluations will be conducted annually, on or about the anniversary date of employment with YPICS. The frequency of

performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems. Failure to evaluate the Employee shall not prevent YPICS from disciplining or dismissing the Employee in accordance with this Agreement.

6. **Employee Rights**

Employment rights and benefits for employment at YPICS shall only be as specified in this Agreement, YPICS’s charters, the Charter Schools Act, and YPICS’s Employee Handbook, which YPICS may amend and modify from time to time. Employment rights and benefits may be affected by other applicable agreements or directives or advisories from the California Department of Education or the State Board of Education. During the term of this Agreement, the Employee shall not acquire or accrue tenure, or any employment rights with YPICS.

7. **Licensure**

The Employee understands that employment is contingent upon verification and maintenance of any applicable licensure and/or credentials.

8. **Child Abuse and Neglect Reporting**

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his/her professional capacity or within the scope of his/her employment whom he/she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident. By executing this Agreement, the Employee acknowledges he/she is a child care custodian and is certifying that he/she has knowledge of California Penal Code section 11166 and will comply with its provisions.

9. **Fingerprinting/TB Clearance**

Fingerprint clearance for the Employee will be acquired through submitting the Employee’s fingerprints to the California Department of Justice. The Employee will be required to assume the cost of all fees related to the fingerprinting process. The Employee will be required to submit evidence from a health care provider that the Employee was found to be free from tuberculosis risk factors, or active tuberculosis if risk factors were identified. Both clearances must be in place prior to the first day of service.

**Commented [CHP1]:** We revised this language as medical professionals other than doctors can complete the risk assessment, such as nurses and physician's assistants.

10. **Conflicts of Interest**

The Employee understands that, while employed at YPICS, he/she will have access to confidential and proprietary information. The Employee therefore shall not maintain employment or contracts for employment, or engage in any consultant or independent



contractor relationship, with any other agency or school that will in any way conflict with his/her employment with YPICS.

11. **Outside Professional Activities**

Upon obtaining prior written approval of the Executive Director, the Employee may undertake for consideration outside professional activities, including consulting, speaking, and writing. The outside activities shall not occur during regular work hours. YPICS shall in no way be responsible for any expenses attendant to the performance of such outside activities.

C. **TERMINATION OF AGREEMENT**

This Agreement may be terminated by any of the following:

1. **At-Will:** During the first ninety (90) days of employment pursuant to this Agreement, either YPICS or the Employee may terminate the employment relationship at any time, with or without cause or advance notice. The Employee also may be demoted or disciplined and the terms of his/her employment may be altered at any time, with or without cause, at the discretion of YPICS. No one other than the Board has the authority to alter this arrangement, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to the terms of this Agreement, and any such agreement must be in writing and must be signed by the Board and by the affected employee and must specifically state the intention to alter this “at-will” relationship during the first ninety (90) days of employment pursuant to this Agreement.
2. **Termination For Cause:** YPICS may terminate this Agreement for “cause” at any time. “Cause” includes, but is not limited to, the following: a) failure to satisfactorily fulfill job requirements; b) violation of this Agreement, the Employee Handbook, or any other YPICS policies/procedures; c) reductions in force due to lack of work/funds; d) inability of the Employee to perform the essential functions of the position, with or without a reasonable accommodation, due to a physical or mental disability after exhausting available leave benefits; or e) YPICS’s receipt of a notification from the California Department of Justice that the Employee is not authorized or fit to work with children in the discretion of YPICS. In the event that YPICS terminates this Agreement for cause, the Employee shall receive written notice of the basis for the termination and payment through the termination date.
3. **Early Termination without Cause:** YPICS may unilaterally terminate this Agreement without cause. In consideration of YPICS’s right to terminate this Agreement without cause, the Employee shall receive the remainder of his/her salary (based upon any remaining calendared work days) for the term of this Agreement or for a period of one (1) calendar month following the effective date of termination, whichever is less.
4. **Revocation/Nonrenewal of Charter:** In the event that the YPICS charter with the District is either revoked or nonrenewed, this Agreement shall terminate immediately

upon the effective date of the revocation/nonrenewal of the charter.

5. **Death or Incapacitation of Employee:** The death of Employee shall terminate this Agreement and all rights provided under this Agreement. In the event that Employee becomes incapacitated to the extent that, in the judgment of YPICS, Employee may no longer perform the essential functions of his/her job with or without reasonable accommodation, as set forth in the job specifications, YPICS may terminate this Agreement.

- D. **NON-RENEWAL/EXPIRATION OF TERM.** YPICS may elect not to offer future employment agreements to Employee at its sole discretion, without cause, and this Agreement will lapse by its own terms. YPICS shall endeavor to provide notice of non-renewal by May 30. The Employee is requested to notify YPICS in writing by March 15 of any intent not to return.

E. **CONFIDENTIALITY OF INFORMATION POLICY**

During employment, the Employee may have access to and/or become aware of information of a confidential, proprietary, or private nature (“Confidential Information”). For purposes of this policy, “Confidential Information” includes, but is not limited to, information and data relating to YPICS’s students, non-public YPICS budget or financial information, and payroll and personnel information relating to current or former employees.

At all times during and after employment with YPICS, the Employee is required to hold all Confidential Information in trust and keep Confidential Information confidential. Additionally, the Employee must comply with all confidentiality-related obligations imposed by the Family Educational Rights and Privacy Act (FERPA).

During employment with YPICS, the Employee may use Confidential Information or disclose Confidential Information to a third party only: (1) as reasonably required in the course of employment with YPICS; (2) as permitted with the prior written consent of YPICS; or (3) as may otherwise be required by law. If the Employee is in doubt about whether information should be disclosed or used, Employee should discuss the situation with the YPICS School Executive Administrator or the Executive Director before disclosing or using the information.

The Employee’s obligations under this Confidentiality of Information policy remain in effect even after his or her employment relationship with YPICS ends. After separation of employment, the Employee may not use or disclose Confidential Information to any third party unless required to do so by law. Upon separation of employment, the Employee must immediately return to YPICS any and all documents, computer or electronic files, printouts, copies, or other information containing Confidential Information in the Employee’s possession, custody or control. If the Employee is requested to disclose Confidential Information to a third party in a subpoena or similar type of request, the Employee shall give written notice to the current YPICS School Executive Administrator of such request as soon as is reasonably possible and at least five (5) business days prior to the Employee making any such disclosures.

By signing below, the Employee certifies that he or she understands and agrees to abide by this Confidentiality of Information policy.

**F. GENERAL PROVISIONS**

1. **Waiver of Breach**

The waiver by either party, or the failure of either party to claim a breach of any provision of this Agreement, will not operate or be construed as a waiver of any subsequent breach.

2. **Assignment**

The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the heirs, legal representatives, successors and assigns of the parties hereto; provided, however, that this Agreement will not be assignable by either party without prior written consent of the other party.

3. **Governing Law**

This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of California.

4. **Partial Invalidity**

If any provision of this Agreement is found to be invalid or unenforceable by any court, the remaining provisions hereof will remain in effect unless such partial invalidity or unenforceability would defeat an essential business purpose of the Agreement.

**G. ACCEPTANCE OF EMPLOYMENT**

By signing below, the Employee declares as follows:

1. I have read this Agreement and accept employment with YPICS on the terms specified herein.
2. All information I have provided to YPICS related to my employment is true and accurate.
3. A copy of the job description is attached hereto.
4. This is the entire agreement between YPICS and me regarding the terms and conditions of my employment. This is a final and complete agreement and there are no other agreements, oral or written, express or implied, concerning the subject matter of this Agreement.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**YPICS Approval:**

Date: 04/03/2023



\_\_\_\_\_  
Yvette King-Berg, Executive Director

***This Employment Agreement is subject to ratification  
and approval by the Governing Board of YPICS.***

## Coversheet

### Recommendation to approve the Employer Retention Tax Credit Retainer Agreement

**Section:** V. Items Scheduled For Action  
**Item:** A. Recommendation to approve the Employer Retention Tax Credit  
Retainer Agreement  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
1. Recommendation to approve the Employer Retention Tax Credit retainer agreement at 8% contin  
gency fee with CFOMW Tax, LLC..pdf



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve the Employer Retention Tax Credit retainer agreement at 8% contingency fee with CFOMW Tax, LLC.**

### BACKGROUND

The Employee Retention Credit (ERC) is a refundable tax credit for businesses that continued to pay employees while shut down due to the COVID-19 pandemic or had significant declines in gross receipts from March 13, 2020 to Dec. 31, 2021. Eligible employers can claim the ERC on an original or adjusted employment tax return for a period within those dates. Only recovery startup businesses are eligible for the ERC in the fourth quarter of 2021.

An employer is eligible for the ERC if it:

- Sustained a full or partial suspension of operations limiting commerce, travel or group meetings due to COVID-19 and orders from an appropriate government authority, or
- Experienced a significant decline in gross receipts during 2020 or a decline in gross receipts during the first three quarters of 2021 or
- Qualified in the third or fourth quarters of 2021 as a recovery startup business.

### ANALYSIS

This action item seeks the approval of the Employer Retention Tax Credit retainer agreement through Michael Williams, a California-licensed attorney. His firm focuses its practice on tax planning and credits; he is the tax attorney proposing to provide this service. We review whether there is any risk to (1) being denied a refund and whether that presents issues of cash flow or charges of frivolous filings, (2) media concerns, and (3) potential costs. In sum, we believe there is minimal to no risk from (1) and (2), and the risk of (3) can be mitigated by cost structure of attorney fees. Regarding (1), some of the risk is already mitigated because we are seeking a refund. If we had applied for the ERC as many companies did during the early part of the

pandemic, we would withhold our requested amount. The danger is if the IRS denied the request, then we would have to pay the money back to the IRS. However, this period is past and now the only option under the ERC is to request a refund. There is less risk here because if the IRS denies a refund from the IRS, there is nothing to pay back. They either send you a check or deny the request (from which we could appeal if we so chose).

There is minimal risk of fraudulent or frivolous filings. This risk is largely borne by the attorney filing the returns, but, regardless, we have done our due diligence with not just the attorney himself, but also I have reviewed the FAQs on eligibility. Regarding the risk associated with (3) described above, we can mitigate this in a couple of ways. One, by paying our fees on a contingency basis, we don't pay any fees if we do not get the refund. Two, we can ask our attorney to cover possible appeal and audit costs under this contingency fee arrangement. Thus, the most likely downside risk is not paying anything at all, as if the IRS disagrees with our claim at a later date, we can abate any potential penalties as we can clearly demonstrate that we've done our due diligence and relied on the advice of an experienced tax attorney who has filed a substantial number of claims for charter schools in California and around the country. The attorney charges a success-based fee for his services; at our credit size his rate is **8%**, which is in line with other schools that we have discussed regarding their ERC filings. If all quarters are approved for which we qualify, the total credit would be in excess of **\$1,682,151**. It is possible that not all quarters receive approval, as each is judged on its own merit. As such, the refund amount will only be known if and when the IRS approves the refund claim.

## **RECOMMENDATION**

It is recommended that the Board of Directors approve the Employer Retention Tax Credit retainer agreement at 8% contingency fee.

# Coversheet

## Recommendation to approve Expenditures Above the Executive Director's Spending Authority

**Section:** V. Items Scheduled For Action  
**Item:** B. Recommendation to approve Expenditures Above the Executive Director's Spending Authority  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
2. Recommendation to approve items that exceed the Spending Levels of ED (2).pdf





## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve expenditures up to \$50, 000.**

All expenditures over \$50,000 must be approved by the Board of Directors. The Executive Director has the authority to approve expenditures up to \$50,000. All expenditures over \$50,000 must be approved by the Board of Directors.

### ANALYSIS

The following expenditures exceed the Executive Director's spending authority, and the Board is asked to review and approve the items.

**Facilities:** Bert Corona Charter School

### RECOMMENDATION

It is recommended that the Board of Directors approve the expenditures for work required to move storage bins to the back of the Bert Corona Charter School property in the amount of \$15,551, \$17,600, and \$23,369 for a total of \$56,520 by Green Works. The scope of work includes:

1. Demolition and removal of existing electrical/fencing/benches, and grading
2. Installing new electrical/lighting/concrete pads
3. Moving three existing storage bins and adding two storage bins
4. Installing new fencing and gates

### BACKGROUND

The San Fernando Valley Japanese Community Center requested that the storage bins at Bert Corona Charter School be moved from the Temple side (north side) of the property to the back of the property (East side). The SFVJACC sees the storage bins as an eyesore that faces the Community Temple. The SFVJACC made this request as part of the negotiation process for the new 15-year BCCS/ SFVJACC lease agreement. The work needs to be completed during the summertime and as soon as possible.

## Coversheet

### Recommendation to approve the 2023-2024 Local Control and Accountability Plans for BCCS, MORCS, and BCCHS

**Section:** V. Items Scheduled For Action  
**Item:** C. Recommendation to approve the 2023-2024 Local Control and Accountability Plans for BCCS, MORCS, and BCCHS  
**Purpose:** Vote

**Submitted by:**

**Related Material:**

3a. Recommendation to approve 2023-2024 Local Control and Accountability Plans (LCAPs) for Bert Corona Charter School, Monseñor Oscar Romero Charter School, and Bert Corona Charter High School .pdf

3b. 2023\_Local\_Control\_and\_Accountability\_Plan\_Bert\_Corona\_Charter\_School\_20230623.pdf

3c. 2023\_Local\_Control\_and\_Accountability\_Plan\_Monsenor\_Oscar\_Romero\_Charter\_Middle\_School\_20230623.pdf

3d. 2023\_Local\_Control\_and\_Accountability\_Plan\_Bert\_Corona\_Charter\_High\_School\_20230623.pdf



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve 2023-2024 Local Control and Accountability Plans (LCAPs) for Bert Corona Charter School, Monseñor Oscar Romero Charter School, and Bert Corona Charter High School**

### BACKGROUND

As per Education Code sections 52060, 52066, 47605, 47605.5, and 47606.5:

*The LCAP is intended to be a comprehensive planning tool. LEAs may reference and describe actions and expenditures in other plans, and funded by a variety of other fund sources when detailing goals, actions, and expenditures related to the state and local priorities. LCAPs must be consistent with school plans submitted pursuant to Education Code section 64001. The information contained in the LCAP, or annual update, may be supplemented by information contained in other plans (including the LEA plan pursuant to Section 1112 of Subpart 1 of Part A of Title I of Public Law 107-110) that are incorporated or referenced as relevant in this document.*

*Charter schools, pursuant to Education Code sections 47605, 47605.5, and 47606.5, must describe goals and specific actions to achieve those goals for all pupils and each subgroup of pupils identified in Education Code section 52052, including pupils with disabilities, for each of the state priorities as applicable and any locally identified priorities. For charter schools, the inclusion and description of goals for state priorities in the LCAP may be modified to meet the grade levels served and the nature of the programs provided, including modifications to reflect only the statutory requirements explicitly applicable to charter schools in the Education Code.*

A public hearing was conducted at the June 5, 2023, regular meeting of the board.

### ANALYSIS

The LCAP describes the goals, actions, services, and expenditures to support positive student outcomes that address state and local priorities. The LCAP provides an opportunity for local educational agencies to share their stories of how, what, and why programs and services are selected to meet their local needs.

The LCAP Federal Addendum is designed to supplement the LCAP to ensure schools meet the Local Educational Agency (LEA) Plan provisions of The Every Student Succeeds Act (ESSA).

The Executive Director, Chief Operations Officer and Executive Administrators of the YPI Charter Schools present these final LCAP documents after careful review and analysis of the work the schools have accomplished and plans for the new school year. The LCAPs for the three YPICS schools will be submitted to the Los Angeles County Office of Education by June 30, 2023.

## **RECOMMENDATION**

It is recommended that the Board of Directors approve the Local Control and Accountability Plans (LCAPs) and Federal Addendums for Bert Corona Charter School, Monseñor Oscar Romero Charter School, and Bert Corona Charter High School as submitted.

## LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Bert Corona Charter School

CDS Code: CA

School Year: 2023-24

LEA contact information:

Yvette King Berg

Executive Director

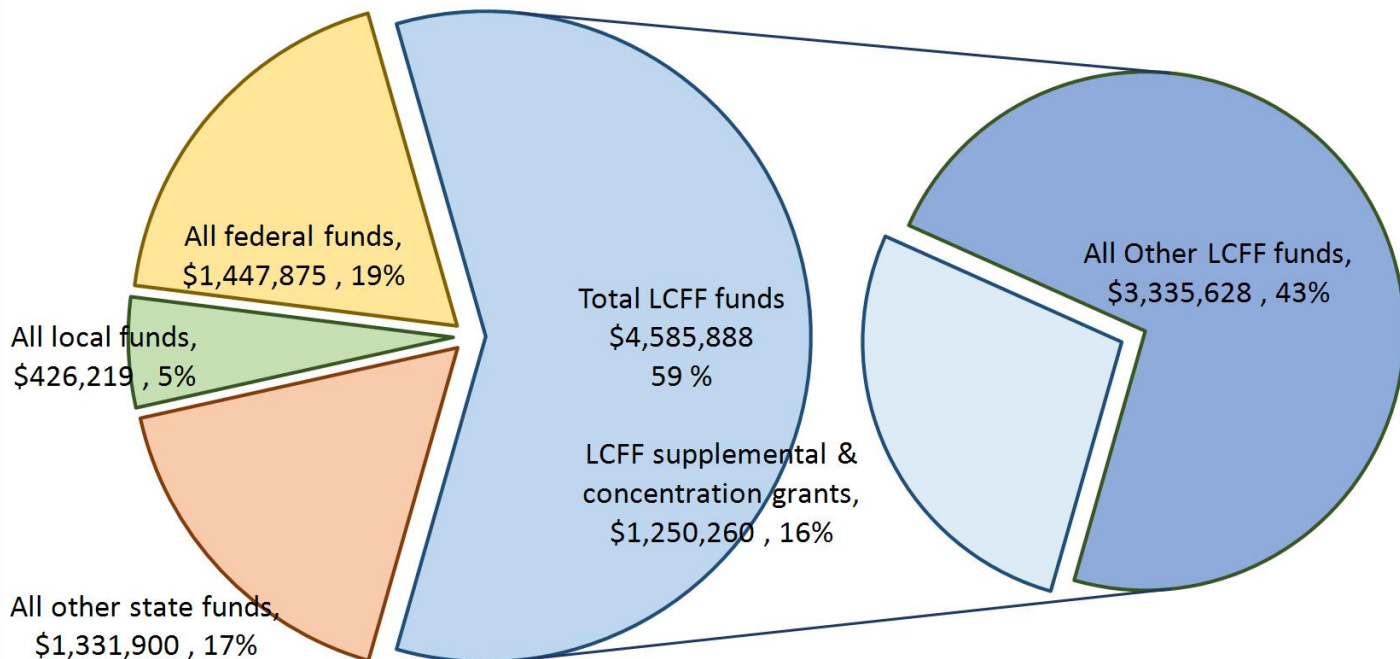
ykingberg@ypics.org

(818) 305-2791

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

### Budget Overview for the 2023-24 School Year

#### Projected Revenue by Fund Source

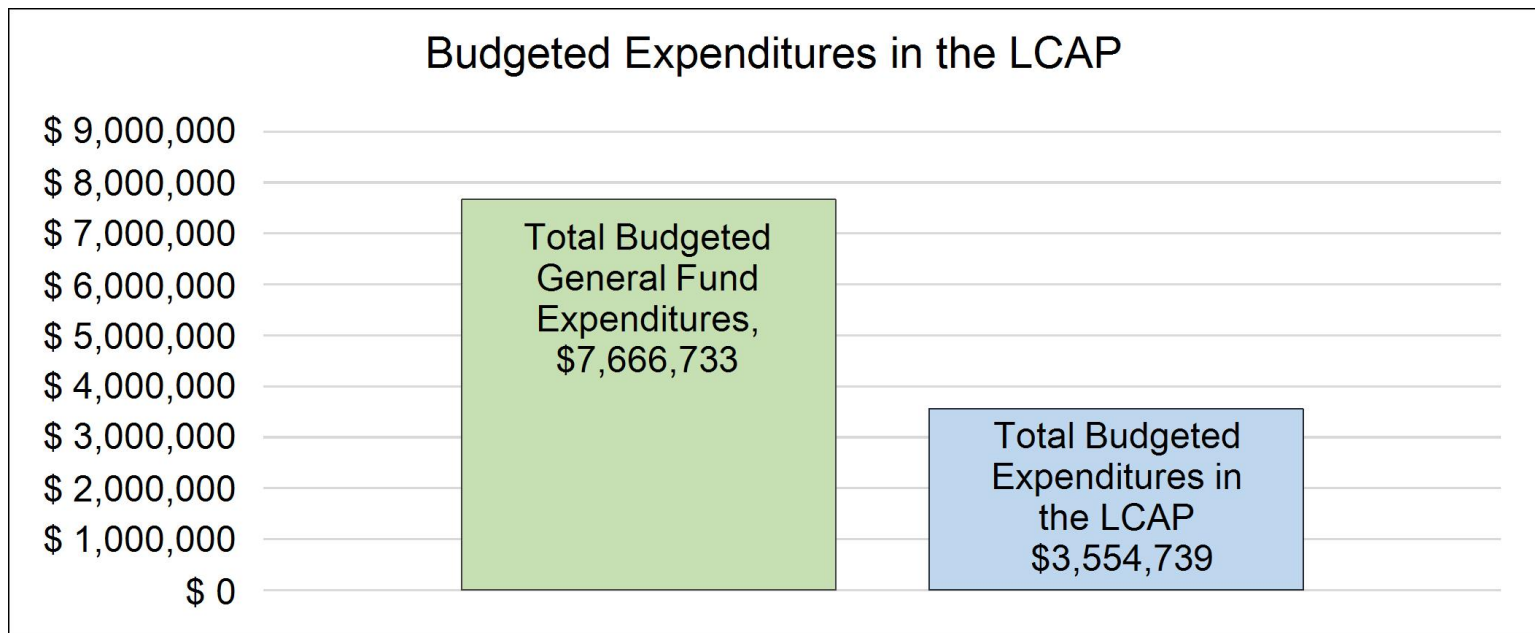


This chart shows the total general purpose revenue Bert Corona Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Bert Corona Charter School is \$7,791,882, of which \$4,585,888 is Local Control Funding Formula (LCFF), \$1,331,900 is other state funds, \$426,219 is local funds, and \$1,447,875 is federal funds. Of the \$4,585,888 in LCFF Funds, \$1,250,260 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

## LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Bert Corona Charter School plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

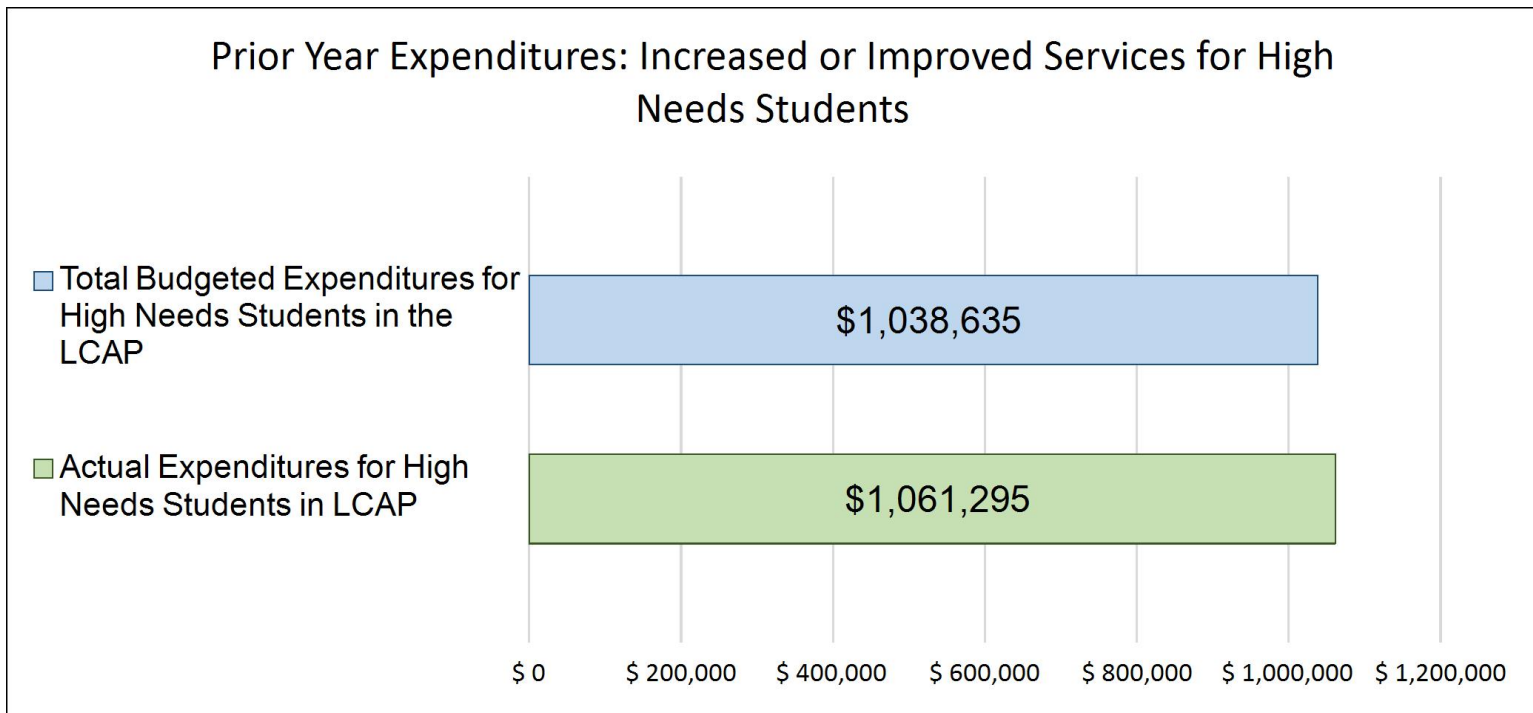
The text description of the above chart is as follows: Bert Corona Charter School plans to spend \$7666733 for the 2023-24 school year. Of that amount, \$3,554,739 is tied to actions/services in the LCAP and \$4,111,994 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

### Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Bert Corona Charter School is projecting it will receive \$1250260 based on the enrollment of foster youth, English learner, and low-income students. Bert Corona Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Bert Corona Charter School plans to spend \$1,325,367 towards meeting this requirement, as described in the LCAP.

## LCFF Budget Overview for Parents

### Update on Increased or Improved Services for High Needs Students in 2022-23



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

The text description of the above chart is as follows: In 2022-23, Bert Corona Charter School's LCAP budgeted \$1,038,635 for planned actions to increase or improve services for high needs students. Bert Corona Charter School actually spent \$1,061,295 for actions to increase or improve services for high needs students in 2022-23.



# Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Bert Corona Charter School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Plan Summary [2023-24]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Bert Corona Charter School (BCCS), a Youth Policy Institute Charter School (YPICS), serves 337 students in the San Fernando Valley area of Los Angeles County. Student groups represented include 0.9% African American, 95.5% Latino, 3.3% White, 32.3% English Learners, 1.2% Foster Youth, 1.8% Homeless, 22.3% Students with Disabilities, and 86.4% Socioeconomically Disadvantaged. (Source: CDE DataQuest, Enrollment Report 2022-23)

**VISION:** Our school is named in honor of and inspired by Bert Corona, a prominent Latino community organizer who dedicated his life to lead the struggle of poor immigrant communities in California and across the nation for social and economic justice.

**MISSION:** The Bert Corona Charter School prepares urban students in grades 5-8 for academic success and active community participation. The school is located in the San Fernando Valley of Los Angeles, California, an area fraught with poverty and academically struggling students. The majority of students attending schools in this area come from predominantly Latino immigrant families where Spanish is spoken in the home. Many area public school students are eligible for federal free or reduced meals, indicative of the high poverty levels in the area. Bert Corona Charter School seeks to close the achievement gap for these students by providing clear and high expectations for all students to achieve a personalized and supportive learning environment that recognizes students' accomplishments, family-school-community partnerships and service, and integrated technology in the classroom.

The Charter School also serves a wide range of scholars requiring a rigorous program that includes acceleration, differentiated instruction, depth, and complexity. The Charter School is a data-driven school that uses assessment data to understand and improve scholar and school performance. The assessment data (diagnostic, formative, and summative) helps the Charter School continuously plan, monitor, and improve academic programs. Staff reviews the previous spring's state testing results to evaluate the school's academic program and chart a course for the new year based on the students' needs. Subgroups in need of intervention/acceleration are identified and monitored. In addition to state testing, other assessments include publisher assessments, student work samples, and i-Ready Diagnostic assessments. The Charter

School is a data-driven school that uses assessment data to understand and improve scholar and school performance. The assessment data (diagnostic, formative, and summative) helps the Charter School Continuously plan, monitor, and improve academic programs. Staff reviews the previous spring's state testing results to evaluate the school's academic program and chart a course for the new year based on the students' needs. Subgroups in need of intervention are identified and monitored. In addition to state testing, other assessments include publisher assessments, student work samples, and i-Ready Diagnostic assessments.

Assessments are used to: Identify scholars and subgroups who need additional instruction or intervention; Prescribe a re-teaching or acceleration focus for individual scholars; Identify professional development needs and target school resources.

The Charter School's educators believe it is essential to take a multidimensional approach to meet the needs of its diverse population. The Charter School addresses the social and emotional needs of all students. Teachers analyze data to determine each student's unique talents and needs. Students who are on grade level and approaching proficiency are targeted in the critical instructional areas that propel them to advance in all areas. Students struggling with basic skills are provided grade-level instructional materials and targeted for support by various education experts, Education Specialists, school psychologists, speech pathologists, classroom teachers, and administrators.

The Charter School created its own culture of awareness with considerate, committed, and conscientious teachers serving the needs of our scholars. Many visitors, including the LAUSD Charter Schools Division Executive Director and staff, The US Department of Education, and elected officials have recognized the positive culture at the Charter School.

## Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

CA School Dashboard 2021-22

- Local Indicators: As reported to the Board of Directors, BCMS met all five local indicators for 2022.
- English Learner Progress Indicator (“Medium” 45.2% making progress towards English language proficiency)
- Suspension Rate Indicator ( “Medium” 2.8% suspended at least one day)

Local Data 2022-23:

## Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

BCCS has been identified for Additional Targeted Support & Improvement (ATSI) based on the performance of its Hispanic (HI), socioeconomically disadvantaged (SED) and students with disabilities (SWD) student groups. It is important to recognize the overlap in the student groups for which the school was identified for ATSI. As the dually identified students and students with IEPs in BCCS face the most difficulty in meeting standards, we have reorganized our SpEd program to have a dedicated RSPs for each grade level. This also allows for the general education teacher to be supported in the implementation of students' IEPs and "push-in" for students. Additionally, BCCMS has implemented acceleration and study hall before, during and after the instructional day as an added level of intervention for students in need.

### CA School Dashboard 2021-22

- Chronic Absenteeism ("Very High" 27.2% chronically absent): All of the statistically significant student groups (English learners, Hispanic, Socioeconomically Disadvantaged, and Students with Disabilities) identified as "Low".
- English Language Arts ("Very Low" -73.6 points below standard for the school) In 2022, the significant student groups below standard were English learners at -124.1 DFS ; Students with Disabilities -156.8 DFS; Hispanic -74.2 DFS; Socioeconomically Disadvantaged -75.5 DFS.
- Mathematics ("Very Low" -120.7 points below standard for the school) In 2022, the significant student groups below standard were English learners -165.2 DFS; Students with Disabilities -182.7 DFS; Socioeconomically Disadvantaged -122.4 DFS; Hispanic -121 DFS.

### Local Data 2022-23:

1) Focus on full implementation of MTSS and Tiered supports schoolwide. We have been focused on developing our processes and systems for Tier II and III supports this year, and we have taken some steps to develop a stronger Tier 1 (universal program). Next year, the goal is to have all areas working together to ensure positive student behavior and growth across the board. We will be working on this schoolwide, so teachers will be using PBIS tools to reflect on their program implementation and they will be coached to have all elements of a strong classroom framework in place. We will be revamping our advisory curriculum over the summer to ensure that advisory class next year is focused on teaching and reinforcing expectations and that we have targeted areas of focus like inclusion, ethical behavior, goal setting, and anti-bullying. We will also continue to implement our Tier II and III support through our MTSS meeting and review process. Students will be discussed during a weekly MTSS meeting and we will determine how to best support and assess our students; when needed, we will engage in the SSPT process for our students so wrap-around services can be in place.

2) Focus on EL performance and growth- building on our successes from the 22-23 school year, we will continue to push growth for our ELs. This year, our focus more on out-of-classroom support with some coaching and support for our teachers. In 23-24, our plan is to be very intentional about our implementation of key strategies and programs in every classroom to ensure optimal success for our ELs. The out-of-classroom and supplementary support will continue, but we will also work with our teachers to provide quality first-time academic experiences for our ELs in their content area classes. We will also use our ELlevation program to help our math teachers improve instruction for ELs, particularly in the area of the development of the language of math.

3) Finally, we will focus on chronic absenteeism. In the classroom, we will work with teachers to design engaging lessons and projects that will help raise student desire to come to campus. We will have fun games and activities on campus for students to help them feel connected outside of the classroom. We are developing a home visit policy and practice so we can regularly meet families in their place of need and go to them to identify supports they need to help their child succeed. Finally, we will ensure we are on top of attendance from the start of the year so we know our families are receiving regular support and reminders to keep them accountable about attendance.

## LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

The prior year's LCAP contained three goals:

Goal 1: Increase Student Achievement

Goal 2: Increase meaningful and purposeful student, teacher, and parent engagement.

Goal 3: Provide an appropriate Basic Condition of Learning Social-emotional and behavioral support with extended classes and enrichment activities for students, and ensure all students are actively engaged and supported through a safe, healthy, and rigorous learning environment. Increase student engagement.

Based on analysis of the 2022 CA Dashboard and consultation with our educational partners, it was determined that the 2023-24 LCAP should be expanded to five goals:

- Goal 1 Conditions of Learning

Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff.

(State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)

- Goal 2 Annual Growth & Achievement in English Language Arts

Increase student achievement in English/Language Arts - Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth. (State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)

- Goal 3 Annual Growth & Achievement in Mathematics & Science

Increase student achievement in Mathematics and Science - Maintain high standards for our community to engage students in high levels of achievement in mathematics through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and academic supports are delivered in a timely manner to maximize student growth.

(State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)

- Goal 4 Growth & Achievement for English Learners and At-Promise Students

Annual growth for English Learners and special student groups - Ensure English learner students are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science.

(State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)

- Goal 5 School Culture & Climate

Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes.

(State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)

Additionally, to provide increased transparency for educational partners and alignment to the LCFF State Priorities, several metrics have been added as we seek to improve student outcomes in order to exit the CDE identification of the school for Additional Targeted Support & Improvement (ATSI).

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Bert Corona Charter Middle School was not identified for CSI by the CDE .

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not applicable.

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not applicable.

# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

YPI Charter Schools (YPICS) developed a Task Force that began during the 2021-22 academic year, and its focus led to the focused educational partner engagement process used for the 2022-23 academic year.

While the school-based decision-making bodies (e.g., School Advisory Council/English Learner Advisory Council) regularly met to examine the growth and needs of our low-income and English learner students, the organization-wide implementation of the Youth Truth Surveys and Community Data Walk practices has been most impactful for continuous progress monitoring of multiple data points.

For the revision of the LCAP for 2023-24, was based on the following inputs from our educational partners:

- Youth Truth Survey & Community Data Walks (October 2022) for students, parents, staff, administrators/teachers
- Quarterly "Coffees with the Director" (September, December, February, and April)
- Parent/ Family Workshops held throughout the academic year where the topics of programming were guided by the needs expressed by parents (e.g., drug-use, vaping, etc.)
- Student Advisory Courses: Students were engaged by their respective Advisory teachers on facets of the LCAP around climate/culture and instructional supports.
- On-going professional development: Throughout the academic year, the instructional leadership team and teachers regularly engaged in progress monitoring of data and reflected on needs and how to best approach changes necessary to positively impact student achievement.

Members of the BCCS community were invited to participate in the Board Public Hearing set to review this plan prior to its approval in June 2023.

In 2022 the school was awarded a California Community Schools Partnership Program Planning Grant. Total funding of \$200,000 supported with hiring a Coordinator of Community Schools (CoCS), contract services for data analyses, teachers/staff stipends, parent capacity development, and teacher/staff professional development.

School Community engagement kicked off in August 2022 with an overview of the CA community school framework and the YPICS vision for its community school to teachers and staff during the beginning of the school year professional development days. Followed by parent-teacher conferences, workshops, SAC/ELAC meetings, Café con Los Directors, and community events during the months of September - December 2022. During parent-teacher conferences. CoCS introduced the community school framework and the LCAP to parents and an overview of the assets and needs assessment work ahead. In October and November, families were engaged via annual events like Trunk-or-Treat, Día De Los Muertos, and College & Career Parent workshops.

To understand the needs and gaps the evaluation team conducted sensemaking sessions with the community to better understand the experiences of youth, administrators, teachers, and families. The evaluation team analyzed all the data collected from October 2022 to

January 2023 and shared it with the community. The purpose was to ask about their reactions and experiences with the data. In addition, to pose back to the community the needs shared in all the data and have them select their top three interests in school investments. The intended purpose of hosting sensemaking meetings was to share the data collected from the community and collectively analyze it as a team and to inform the LCAP and the implementation plan for the school. Upon completion of all assessment activities, priority topic areas were identified for the school and will be the areas to focus on by aligning resources, strategies, and partnerships.

#### A summary of the feedback provided by specific educational partners.

To address the needs of our community school, the school undertook a comprehensive community school planning process that included asset mapping (reviewing of the LCAP), a needs assessment and gap analysis, and a heavy emphasis on engagement with and leadership by the school community, including students, families, staff, teachers, administrators, partners, and area residents.

Community School and LCAP needs assessment activities occurred throughout the year. These included YouthTruth Survey and Focus Groups with stakeholders. In-person focus groups were conducted with students, teachers, and families at each school across grade levels and positions (instructional and supportive staff) SAC/ELAC members to gain a more holistic understanding of the strengths and challenges of our school. Key Informational Interviews with staff and teachers and in-person interviews were conducted with school administrators and teachers to assess successes and challenges with the school culture and the range of services offered at the school. Focus groups explored topics like what makes them feel welcome/unwelcome on campus, what makes them feel successful as learners and teachers in their vision for a "community school," if they feel engaged in decision-making, how the school can build more trusting relationships, and what support services are needed.

All assessment activities examine needs and gaps in services and school and community assets and resources that can be integrated as part of our community school. The input of stakeholders has been instrumental in developing our school's LCAP and the Community Schools Implementation Plan.

In April and May, the LCAP was drafted and ready for input from University and LAUSD Partners (LMU, UCLA, and Charter Operated Programs Options Staff) LMU reviewed the plan specifically for EL Actions and ensured that the school has a way to manage a comprehensive EL Master plan aligned the CA Roadmap for ELs. UCLA reviewed Social-emotional support for counseling services, and Charter Operated Programs reviewed actions for students with disabilities (tiered and tutoring supports).

The YPICS Board held a public hearing/update for input from both the board and the public on June 5, 2023.



A description of the aspects of the LCAP that were influenced by specific input from educational partners.

The following are aspects of the LCAP that stakeholders influenced.

Focus on Essential Standards (Learning Outcomes/Indicators)

- Identify/revise essential standards for each grade/course;
- Ensure all students have access to grade-level Essential Standards and materials;
- Identify students who need additional support to accelerate learning and to mitigate pupil learning loss;
- Schedule time for students experiencing pupil learning loss.

All feedback collected throughout the above process resulted in the LCAP actions, which are aligned with the YPICS vision to improve Cornerstone Commitments of Community Schools: A commitment to assets-driven and strength-based practices for all stakeholders; A commitment to racially just and restorative school climates; A commitment to powerful, culturally proficient, and relevant instruction; and a commitment to shared decision-making and participatory practices to improve student achievement and outcomes.



# Goals and Actions

## Goal

Goal #	Description
1	<p>Goal 1. Conditions of Learning</p> <p>Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff.</p> <p>(State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)</p>

An explanation of why the LEA has developed this goal.

While the prior LCAP contained a goal similar to this new goal, it was all encompassing and left members of the community overwhelmed with the combination of academic progress data AND basic conditions of learning. The new goal was created for the 2023-24 LCAP to allow for a separation of these two areas.

As discussed in the Educational Partner Engagement section, the implementation of the community-wide Data Walks, we want to ensure there is a clear understanding of the basic enabling conditions that are necessary to be in place for students to experience not only continued academic growth, but also safety and an environment which nurtures/supports their social emotional needs as well.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teaching Credentialing and appropriate EL authorization; all teachers will be	100% All classroom teachers hold a valid CA Teaching Credential as defined by the CA Commission on Teaching Credentialing and have appropriate EL authorization. All teachers were	63.2% Clear (Source: CDE DataQuest, 2020-21 Teaching Assignment Monitoring Outcomes by Full-Time Equivalent 2020-21)	TBD - 2021-22 Teaching Assignment Monitoring Outcomes		All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization; all teachers will be appropriately assigned

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
appropriately assigned. Priority 1 Basic Services	appropriately assigned.	Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization. All teachers appropriately assigned.”]			
Access to standards-aligned curricular and instructional materials Priority 1 Basic Services	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% teachers/ students with access to standards- aligned curricula (ELA, 100% teachers/ students with access to standards- aligned curricula (ELA, ELD, math, science, social science, and social science) (Source: As reported in the 2023 Local Indicators Self Reflection Tool, May 2023)		100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards aligned curricula (ELA, ELD, math, science, social science, and social science)
Implementation and sustainability of academic content standards, as measured by the Local Indicator Rubric on the California	Same as Year 2 Outcome	N/A	Implementation of State Standards 2023  ELA 5 ELD 5 Math 5 NGSS 5 History 5		Implementation of State Standards  ELA 5 ELD 5 Math 5 NGSS 5 History 5

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Accountability Dashboard Priority 2 Implementation of adopted State Standards			CTE 5 Health 5 Phys. Ed 5		CTE 5 Health 5 Phys. Ed. 5
Teachers will participate in ongoing research-based professional development in the areas of English Language Arts, Math, Next Generation Science Standards (NGSS), English Language Development (ELD), Technology, and Differentiated instruction to meet the needs of all students and subgroups. Priority 2 Implementation of adopted State Standards	100% Teachers participated in professional development throughout the physical closure of the Charter School.	100% of teachers participated in professional development for 21-22	100% of teachers participated in professional development for 22-23		100% Teachers participating in professional development
Student Access to a Broad Course of Study Priority 7 Course Access	100% of students have access to a broad course of study	100% of students have access to a broad course of study	100% of students have access to a broad course of study		100% of students have access to a broad course of study

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		CA Dashboard Local Indicator “Met” (Source: CDE, CA School Dashboard 2022)	CA Dashboard Local Indicator “Met” (Source: As reported in the Local Indicators 2023 Self-Reflection Tool)		
School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists with > 90% of items in compliance or good standing. Priority 1 Basic Services	100% The Charter School developed a cleaning regiment based on best practices for reopening schools from the California Department of Public Health (6/5/2020) and the California Department of Education (6/8/2020)	100% of facilities clean and maintained in good repair	Overall Facility Rating as measured by FIT “Exemplary” (Source: As reported in the SARC, February 2023)		School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists with > 90% of items in compliance or good standing

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Facility, Maintenance, Custodial & Security	Costs associated with facility/maintenance/security including annual rent for the property. Custodial staff will ensure facilities are clean and maintained in good repair through daily checks and Site Inspection Lists with >90% of items meeting the "good" standard or better.	\$246,385.00	No
1.2	Administration	Costs associated with the salaries and benefits for administrative staff positions include: Executive Administrator, Operations Coordinator, Parent Coordinator, Community Schools Coordinator, and School Climate & Culture Coordinator.	\$825,161.00	Yes

Action #	Title	Description	Total Funds	Contributing
		The School Climate & Culture Team will continue quality implementation of the PBIS Framework and programs.		
1.3	Credentialed Classroom Teachers	Costs associated with the salaries and benefits for certificated staff to provide standards-based instruction to all students in grades 5-8.	\$1,405,617.00	No
1.4	Paraprofessionals	Costs associated with full-time paraprofessionals for Special Education and instructional aides for general education	\$259,238.00	Yes
1.5	Professional Development	<p>Professional Development for all staff members (Pre-service &amp; On-going) topics include, but are not limited to:</p> <p>RE/LAY Graduate School of Education - Continue training for leaders and teachers to sustain the school vision for high-impact instruction and provide a common framework for coaching, observation and feedback. This allows for a common language and understanding of instructional expectations that are rooted in equity for all students.</p> <p>Critical Friends Group Training to establish and sustain a foundation focused on continuous improvement. The National School Reform Faculty program will be the professional partner for schoolwide training. (School share of cost \$18,317 = 1/3)</p> <p>Universal Design for Learning (UDL) training for administration and staff to create flexible learning environments and learning spaces that can accommodate individual learning differences.</p> <p>Backwards Design training prioritizing the intended learning outcomes instead of topics to be covered, and most importantly facilitating student learning.</p> <p>BTSA Training/ New Teacher Support (Title 2)</p> <ul style="list-style-type: none"> <li>• Backwards Design</li> <li>• Standards-Based Grading</li> </ul>	\$279,664.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<ul style="list-style-type: none"> <li>• Project-Based Learning</li> <li>• Service-Learning</li> </ul> <p>Equity-focused Standards-based Instruction</p> <ul style="list-style-type: none"> <li>• Building Positive Relationships (teacher-student; teacher-family; school-home) and sustaining an inclusive culture based on respectful communication</li> <li>• ELD strategies for English Learners to access grade-level core curriculum/impact academic growth</li> <li>• CCSS and core standards in ELA, ELD, mathematics, Next Gen Science Standards (NGSS), and social sciences</li> <li>• Instructional shifts for maintaining rigorous instruction (lesson design, "big ideas", essential questions, academic discourse, close reading, text-dependent questions, etc.)</li> <li>• Curricular-specific trainings (for core and use of iReady, Infinite Campus, Thinking Nation, writing assessments)</li> <li>• Engaging and empowering students through deeper instruction</li> <li>• Use of data warehouse Innovare to integrate multiple data sources to guide teacher/administration student-centered educational decisions</li> </ul> <p>Supporting the Growth of English Learners &amp; Dually-Identified Students</p> <ul style="list-style-type: none"> <li>• Quality implementation of the English Learner Master Plan aligned to the CA English Learner Roadmap</li> <li>• Implementation of strategies to support EL acquisition/mastery of the English language (speaking, listening, reading, writing)</li> <li>• Understanding the language needs of ELD in acquisition of academic language</li> <li>• Strategies for supporting Students with Disabilities in the general education classroom</li> <li>• Training and use of Success For All instructional strategies to ensure students receive support in the development of foundational skills that posed barriers to accessing grade-level standards-based instructional content</li> </ul>		

Action #	Title	Description	Total Funds	Contributing
		<p>Standards-based Instruction</p> <ul style="list-style-type: none"> <li>• ELD strategies for English Learners to access grade-level core curriculum/impact academic growth</li> <li>• CCSS and core standards in ELA, ELD, mathematics, Next Gen Science Standards (NGSS), and social sciences</li> <li>• Instructional shifts for maintaining rigorous instruction (lesson design, "big ideas", essential questions, academic discourse, close reading, text-dependent questions, etc.)</li> <li>• Curricular-specific trainings (for core and use of iReady, Infinite Campus, Thinking Nation, writing assessments)</li> <li>• Engaging and empowering students through deeper instruction</li> </ul> <p>Multi-tiered System of Support</p> <ul style="list-style-type: none"> <li>• Use of internal data sources to drive decisions/recommendations for academic acceleration and progress monitoring</li> <li>• Positive Behavior and Intensive Support (PBIS) and alternatives to suspension</li> </ul>		
1.6	Core Instructional Materials & Licenses	Costs associated with the on-going use of: iReady ELA and Mathematics textbooks, eTextbooks for NGSS (annual licenses), History Alive (student licenses for eTexts), Thinking Nation platform for access to primary source documents, Google Classroom Suite	\$87,356.00	Yes
1.7	Technology	Technology provided to all students. Based on the Technology Plan developed for cycling out/replenishing student devices.	\$189,425.00	Yes

Action #	Title	Description	Total Funds	Contributing
1.8	Local Assessments	Students will be assessed 3xs per year using the state-verified iReady assessment suite in ELA and math. This data will be used by all teachers to gauge the needed additional supports needed in order to accelerate the acquisition of foundational skills which are necessary for accessing grade-level content.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**



# Goals and Actions

## Goal

Goal #	Description
2	<p>Goal 2. Annual Growth &amp; Achievement in English Language Arts</p> <p>Increase student achievement in English/Language Arts</p> <p>Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.</p> <p>(State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-BCCS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the ELA-specific goal for increased transparency for all. Since BCCS has been identified for ATSI for the performance of the Latino student group, this goal seeks to maintain a focus on the performance of our largest student group under ATSI which is Latino/Hispanic.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
<p>Increase student achievement in English/Language Arts as measured by the SBAC</p> <p>[NOTE: The original metric in 22-23 was "English Language Arts – Proficiency"]</p> <p>Priority 4 Pupil Achievement</p>	<p>SBAC ELA 2019 Met/Exceeded</p> <p>16.76% All (-78.2 DFS)</p> <p>16.98% Latino (-78.9 DFS)</p>	<p>N/A</p> <p>CA Dashboard 2021 – Not published due to COVID</p>	<p>SBAC ELA 2022 Met/Exceeded</p> <p>24.47% All (-73.6 DFS)</p> <p>24.69% Latino (-74.2 DFS)</p>		<p>Annually decrease the negative DFS and improve the percentage of students demonstrating growth on SBAC ELA standards</p>

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase the percentage of students demonstrating growth on Local ELA Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Reading Growth 2022-23  Grade 5 82% Annual Typical 4% Annual Stretch 82% Improved Placement  Grade 6 72% Annual Typical 9% Annual Stretch 66% Improved Placement  Grade 7 63% Annual Typical 28% Annual Stretch 55% Improved Placement  Grade 8 66% Annual Typical 31% Annual Stretch 63% Improved Placement		Increase students demonstrating growth and improving level placement on local iReady assessment

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	SFA Instructional Strategies for Skill Acceleration	Applying the training that has been provided, classroom teachers will apply SFA instructional strategies to address foundational literacy needs of students. The primary setting for the use of the strategies during the regular instructional day in order to accelerate the closing	\$3,676.00	Yes

Action #	Title	Description	Total Funds	Contributing
		skill gaps in ELA, while providing grade-level access to content standards.		

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
3	<p>Goal 3. Annual Growth and Achievement in Mathematics &amp; Science                      Increase student achievement in Mathematics and Science                      Maintain high standards for our community to engage students in high levels of achievement in mathematics through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.                      (State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-BCCS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the math/science-specific goal for increased transparency for all. Math is an ongoing area for growth as our students continue to face challenges with foundational skills while simultaneously needing to access/excel in grade-level standards.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Student achievement in Mathematics as measured by the SBAC [NOTE: The original metric in 22-23 was "Mathematics Proficiency"] Priority 4 Pupil Achievement	SBAC Math 2019 Met/exceeded  11.44% All Students (-109.5 DFS) 11.23% Latino (-110.8 DFS) (Source: CA School Dashboard)	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC Math 2022 Met/exceeded  12.46% All Students (-120.7 DFS) 12.27% Latino (-121 DFS) (Source: CA School Dashboard)		Annually decrease the negative DFS and improve the percentage of students demonstrating growth on SBAC Math standards
Increase the percentage of	Same as Year 2 Outcome	N/A	iReady Math Growth 2022-23		Increase students demonstrating growth

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
students demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes			<p>Grade 5 31% Annual Typical 0% Annual Stretch 46% Improved Placement</p> <p>Grade 6 45% Annual Typical 8% Annual Stretch 52% Improved Placement</p> <p>Grade 7 39% Annual Typical 10% Annual Stretch 46% Improved Placement</p> <p>Grade 8 62% Annual Typical 25% Annual Stretch 59% Improved Placement</p>		and improving level placement on local iReady assessment
Next Generation (Science) as measured by CAST Priority 4 Pupil Achievement	<p>CAST 2019 Met/exceeded 5.68% All 5.92% Latino</p> <p>Nearly Met 65.25% All 65.19% Latino</p>	N/A	<p>CAST 2022 Met/exceeded 7.09% All 7.2% Latino</p> <p>Nearly Met 66.93% All 67.2% Latino</p>		Annually decrease %age of "Nearly Met"

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Acceleration & Study Hall	<p>Acceleration: Credentialed teachers provide academic support and lessons either before or after school targeted for students performing 1-2 grade levels below on their diagnostic assessments. The lessons specifically targeted at learning gaps identified in their classroom assessments and by the iReady diagnostic (math and reading).</p> <p>Study Hall: Facilitated by a certificated teacher, study hall is focused on iReady pathway completion and re-do mastery assignments. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]</p>		No
3.2	Supplemental Curricula	Use of IronBox to address students' math fluency needs which are a barrier to access of grade-level content. Costs associated with this action include materials and math teacher training.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
4	<p>Goal 4. Growth and Achievement for Special Student Populations                      Annual growth for Socioeconomically Disadvantaged, English Learners &amp; Students with Disabilities                      Ensure English learners and Students with Disabilities are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science.                      (State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)</p>

An explanation of why the LEA has developed this goal.

BCCS has been identified for ATSI for certain student groups including our Students with Disabilities. Since the majority of our SWD student group are also English Learners and/or socioeconomically disadvantaged, this goal was created to focus on the academic needs of our most vulnerable students as they face the most substantial barriers to achieving grade-level standards mastery.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
English Learner Progress Indicator – ELs making progress towards English language Proficiency (ELPI) Priority 4 Pupil Achievement	37.2% making progress towards English language proficiency "Low" (Source: 2019 CA School Dashboard)	N/A  CA Dashboard 2021 – Not published due to COVID	45.2% making progress towards English language proficiency "Medium" (Source: 2022 CA School Dashboard)		Annually increase English learner growth in English proficiency as measured by the CA Dashboard English Learner Progress Indicator (ELPI)
English learner proficiency as measured by ELPAC Priority 4 Pupil Achievement	10.23% Proficient 27.27% Level 3 45.45% Level 2 17.05% Level 1 (Source: English Language Proficiency)	12.26% Proficient 25.47% Level 3 42.45% Level 2 19.81% Level 1 (Source: English Language Proficiency)	11.11% Proficient 34.26% Level 3 36.11% Level 2 18.52% Level 1 (Source: English Language Proficiency)		Continue to increase the number of English Proficiency as measured by ELPAC



Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	or Summative ELPAC 2018-19)	or Summative ELPAC 2020-21)	or Summative ELPAC 2021-22)		
Reclassification Rate of EL to RFEP Priority 4 Pupil Achievement	27.1% Reclassification Rate (Source: DataQuest CDE 2018-19)	0% Reclassification Rate (Source: DataQuest CDE 2020-21)	TBD - Reclassification Rate for 2021-22 pending		Annually increase reclassification of English learners
SWD/SED/ELs student achievement in English/Language Arts as measured by the SBAC Priority 4 Pupil Achievement	SBAC ELA 2019  SWD (-137 DFS) 2.6% Met/exceeded 22.08% Nearly Met 75.32% Not Met  SED (-78.2 DFS) 16.72% Met/exceeded 30.55% Nearly Met 52.73% Not Met  EL (-107.2 DFS) 0% Met/exceeded 14.77% Nearly Met 85.23% Not Met	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC ELA 2022  SWD (-156.8 DFS) 4.76% Met/exceeded 12.7% Nearly Met 82.54% Not met  SED (-75.5 DFS) 11.03% Met/exceeded 23.79% Nearly Met 65.17% Not Met  EL (-124.1 DFS) 3.7% Met/exceeded 19.44% Nearly Met 76.85% Not met		Annually decreasing the percentage of SWD/SED/ELs “Not Meeting” and increase percentage of “Meeting/Exceeding”
Increase the percentage of SWD/SED/ELs demonstrating growth on Local ELA Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Reading Growth 2022-23  SWD xx% Annual Typical Growth xx% Annual Stretch Growth		Annually increase percentage of SWD/SED/ELs demonstrating growth in reading as measured by local assessments in ELA

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
			xx% with Improved Placement  SED xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  ELs xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement		
SWD/SED/ELs student achievement in Math as measured by the SBAC Priority 4 Pupil Achievement	SBAC Math 2019  SWD (-176.7 DFS) 1.3% Met/exceeded 9.09% Nearly Met 89.61% Not met  SED (-109.9 DFS) 11.9% Met/exceeded 22.51% Nearly Met 65.59% Not Met  EL (-138.8 DFS) 0% Met/exceeded 9.09% Nearly Met 90.91% Not met	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC Math 2022  SWD (-182.7 DFS) 1.56% Met/exceeded 14.06% Nearly Met 84.38% Not met  SED (-122.4 DFS) 11.03% Met/exceeded 23.79% Nearly Met 65.17% Not Met  EL (-165.2 DFS) 1.85% Met/exceeded 12.96% Nearly Met 85.19% Not met		Annually decrease the percentage of SWD/SED/ELs “Not Meeting” and increase percentage of “Meeting/Exceeding”

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase the percentage of SWD/SED/ELs demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Math Growth 2022-23  SWD xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  SED xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  ELs xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement		Annually increase percentage of SWD/SED/ELs demonstrating growth in math as measured by local assessments
Next Generation (Science) as measured by CAST for SWD/SED/ELs Priority 4 Pupil Achievement	CAST 2019  SWD 0% Met/exceeded 41.67% Nearly Met 58.33% Not met	N/A	CAST 2022  SWD 0% Met/exceeded 50% Nearly Met 50% Not met		Annually decrease the percentage of SWD/SED/ELs “Not Meeting” and increase percentage of “Meeting/Exceeding”

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	<p>SED 5.22% Met/exceeded 64.35 Nearly Met 30.43% Not Met</p> <p>EL 0% Met/exceeded 58.33% Nearly Met 41.67% Not met</p>		<p>SED 8.34% Met/exceeded 65.74% Nearly Met 25.93% Not Met</p> <p>EL 0% Met/exceeded 56.1% Nearly Met 43.9% Not met</p>		

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	Integrated and Designated ELD	<p>Designated ELD will be provided to ELs in alignment with their level of English development. Students will also be provided support during core instruction using push-in and through pull-out time for ELs. Moreover, the EL teacher provides instruction in the resource classrooms and our resource teachers co-teach with her once or twice a week. This provides much more time for support for our ELs and students who are both EL and SPED.</p> <p>[NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]</p>	\$93,311.00	Yes
4.2	Acceleration & Study Hall	<p>Acceleration: Credentialed teachers provide academic support and lessons either before or after school targeted for students performing 1-2 grade levels below on their diagnostic assessments. The lessons specifically targeted at learning gaps identified in their classroom assessments and by the iReady diagnostic (math and reading).</p>		Yes

Action #	Title	Description	Total Funds	Contributing
		Study Hall: Facilitated by a certificated teacher, study hall is focused on iReady pathway completion and re-do mastery assignments. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]		
4.3	Expanded Learning Opportunities Summer Learning & Enrichment	Scholars identified from the targeted LCFF student groups will be granted priority enrollment. This extended instructional time will occur during the summer to address learning loss and address the academic barriers to grade-level standards. The costs associated with this action include supplies, materials, summer stipends for teachers and school tutors.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
5	<p>Goal 5. Positive School Climate &amp; Culture</p> <p>Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes.</p> <p>(State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)</p>

An explanation of why the LEA has developed this goal.

This goal has been developed starting with the 2023-24 academic year to have a more holistic approach to student/family engagement and its impact on the indicators of satisfaction and connectedness. Specifically, BCCS has witnessed an increase in chronic absenteeism since the pandemic and as a community we seek to meaningfully engage the families to foster a deeper understanding of the importance of regular school attendance and its impact on student achievement. We see our efforts are working in the area of on-site safety and positive climate as our suspensions have declined schoolwide. We believe our engagement of parents and fostering positive school-home relationships to be the key to increasing the number of students we have in regular attendance.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
School efforts to increase Parent involvement through input in decision-making via board meetings, SSC, ELAC, and engagement through workshops/trainings Priority 3 Parental Involvement	Same as Year 2 Outcome	N/A	10 Board Meetings held 10 SAC/ELAC meetings held		Maintain monthly meetings of the Board of Directors and SAC Maintain monthly Monthly Parent Trainings/ Workshops to promote college awareness/attendance
Increase parent participation rate on	Same as Year 2 Outcome	N/A	31% Parent Participation		Annual improvement in parent survey

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
parent survey Priority 3 Parental Involvement			89% Input in decision-making 92% Satisfaction		participation rate and ratings of satisfaction
Increase student participation rate on student survey and positive ratings (School Safety & Connectedness) Priority 5 Student Engagement /Priority 6 School Climate	Same as Year 2 Outcome	N/A	88% Student Participation 52% Belonging 62% Relationships		Annual improvement in student survey participation rate and ratings by students
Increase teacher participation rate on school survey Priority 6 School Climate	Same as Year 2 Outcome	N/A	77% Teacher Participation 75% Relationships/ School Culture		Annual improvement in teacher survey participation rate and ratings of satisfaction
Decrease Chronic Absenteeism rate Priority 5 Student Engagement	2019 Chronic Absenteeism  7% All 7.7% SWD 5.6% EL 6.7% Latino 6.9% SED	(ADA and enrollment dropped due to COVID-19 absences and due to operating in the hardest-hit county, city, and community with the highest cases, highest, hospitalizations, and highest death rates in the community).	2022 Chronic Absenteeism Indicator "Very High"  27.2% All 27.3% SWD 26.6% EL 26.3% Latino 27.5% SED		The school will annually decrease and maintain a chronic absenteeism rate below 7%.
Suspension Rate Priority 6 School Climate	2019 Suspension Rate	Maintained below 1%	2022 Suspension Rate Indicator "Medium"		The school will decrease and



Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	6.2% All 5.1% SWD 3.3% EL 6.1% Latino 6.6% SED		2.8% All 3% SWD 4.6% EL 3% Latino 3.3% SED		maintain a suspension rate below 6.2%.
Expulsion Rate Priority 6 School Climate	0% Expulsion Rate	Maintained below 1%	0% Expulsions		The school will continue to maintain an expulsion rate below 1%.
Middle School Dropout Rates Priority 5 Student Engagement	Same as Year 2 Outcome	N/A	0% MS Dropout rate		Dropout rate < 1%
Increase Average Daily Attendance Priority 5 Student Engagement	School will continue to maintain ADA rate at or above 96%	Met modified metric  [NOTE: Due to COVID-19 Attendance Committee specific vision and goal(s) for outreach (2021-22). and enrollment in 22-23. The team continues to address the issues and have a detailed action plan and/or a marketing strategy calendar which includes quarterly check-ins to ensure that the	92% ADA (P-2 reporting 22-23)		94% [NOTE: Modified]

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		implementation is successful.]			

## Actions

Action #	Title	Description	Total Funds	Contributing
5.1	Student Activities & Incentives	The school leadership will work with teachers/advisory course leaders to develop system of activities to promote student engagement and incentivize improvement in metrics identified with school culture/climate including attendance, positive behaviors, academic improvement/growth. The work of the School Climate/Culture Team as well as the Parent Coordinator will align to maximize positive climate and engagement. Team building, school trips (e.g. aligned to educational standards and/or college-going) and cultural events (to underscore our commitment to diversity) will support these efforts in establishing/maintaining a positive school climate.	\$124,906.00	Yes
5.2	Enrollment and Outreach- Schola	Ensure that all parents have on-boarding support from first point of LEA interest and contact through training to use all communications and technology systems to support their child's education at the charter school.	\$40,000.00	No
5.3	Parent/ Guardian Engagement	The Coordinator of Operations will assist with planning and implementation of the annual activities for meaningfully engaging parents/guardians to support the success of their child at BCCS. At minimum, these activities include meetings of the School Advisory Council, English Learner Advisory Committee, back to school night, parent conferences, IEP meetings.		No

Action #	Title	Description	Total Funds	Contributing
5.4	Home/School Communications & Feedback	Use of Infinite Campus to provide cohesive system of schoolwide communications in various languages. Costs associated with the following: <ul style="list-style-type: none"> <li>School communication platform</li> <li>Survey platform for parents, teachers, and students</li> </ul>		No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$1,250,260	\$127,908

### Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
37.48%	0.97%	\$25,141.00	38.45%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For FY 2023-24, YPI-BCCS will implement the following actions on a "schoolwide" basis while ensure these actions are principally directed to and effective for the targeted students groups under the Local Control Funding Formula:

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

BCCS has a detailed plan to increase foster youth, English learners, and low-income student services. The Charter School staff will take on a "triage" approach to screen student need, apply appropriate tiered instruction, monitor student achievement, and revise the application of instructions needed. All students will have access to grade-level instruction and resources (democracy and equity). Based on the analysis of summative and formative assessments, targeted acceleration and intervention will be provided. The focus will be to scale up. Targeted

instruction will be provided to students at their level and address student-specific needs, focusing on skills needed to master grade-level content in language arts, mathematics, and English Language Development. (less is more, depth over coverage). This accelerated instruction will occur during the instructional day and enable a wide range of services from general education teachers, special education teachers, support staff, and administration. A strategic instructional program requires a multi-tiered instructional delivery model responding to each student's individual needs (personalization).

We continue to ensure that all English Learners, foster youth, and low-income with grade-appropriate technology to access online curricular resources. Building upon the lessons learned during the instructional disruption caused by the pandemic, teachers have incorporated Universal Design for Learning (UDL) into their instruction and provide small group support when needed. Our English learner student group has access to daily Designated ELD and integration of SFA for integrated ELD. All certificated and classified worked collectively to meet the needs of English learners, foster youth, and low-income students.

Mental Health and Well-Being of All: Teachers will continue to receive professional development on trauma-teaching along with the tools and resources to move from a learner manager to a Learner Empowered (Active-Citizen).

- Incorporate welcoming/inclusion activities (develop a tone of decency and trust)
- Create learning teams and expectations (student as worker-teacher as coach)
- Use groups to get students talking (SFA the power is in the conversation)
- Set goals together (student agency)
- Core Priorities of Trauma-Informed Distance Learning
- Predictability
- Flexibility
- Connection
- Empowerment

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

All students enrolled at BCCS are identified as being at least one of the identified targeted LCFF student groups. As such, we will use the additional 15% add-on to sustain the focus on equity and inclusion for our students with disabilities, socioeconomically disadvantaged, English learner and foster youth.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		1:29
Staff-to-student ratio of certificated staff providing direct services to students		1:16

## 2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$3,017,369.00	\$187,381.00		\$349,989.00	\$3,554,739.00	\$3,084,513.00	\$470,226.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Facility, Maintenance, Custodial & Security	All	\$246,385.00				\$246,385.00
1	1.2	Administration	English Learners Foster Youth Low Income	\$541,714.00	\$142,275.00		\$141,172.00	\$825,161.00
1	1.3	Credentialed Classroom Teachers	All	\$1,405,617.00				\$1,405,617.00
1	1.4	Paraprofessionals	English Learners Low Income	\$173,103.00			\$86,135.00	\$259,238.00
1	1.5	Professional Development	English Learners Foster Youth Low Income	\$250,293.00			\$29,371.00	\$279,664.00
1	1.6	Core Instructional Materials & Licenses	English Learners Foster Youth Low Income	\$87,356.00				\$87,356.00
1	1.7	Technology	English Learners Foster Youth Low Income	\$189,425.00				\$189,425.00
1	1.8	Local Assessments	English Learners Foster Youth Low Income					
2	2.1	SFA Instructional Strategies for Skill Acceleration	English Learners Foster Youth Low Income	\$3,676.00				\$3,676.00
3	3.1	Acceleration & Study Hall	All					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
3	3.2	Supplemental Curricula	English Learners Foster Youth Low Income					
4	4.1	Integrated and Designated ELD	English Learners				\$93,311.00	\$93,311.00
4	4.2	Acceleration & Study Hall	English Learners Foster Youth Low Income					
4	4.3	Expanded Learning Opportunities Summer Learning & Enrichment	English Learners Foster Youth Low Income					
5	5.1	Student Activities & Incentives	English Learners Foster Youth Low Income	\$79,800.00	\$45,106.00			\$124,906.00
5	5.2	Enrollment and Outreach- Schola	All	\$40,000.00				\$40,000.00
5	5.3	Parent/ Guardian Engagement	All					
5	5.4	Home/School Communications & Feedback	All					



## 2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$3,335,628	\$1,250,260	37.48%	0.97%	38.45%	\$1,325,367.00	0.00%	39.73 %	<b>Total:</b>	\$1,325,367.00
								<b>LEA-wide Total:</b>	\$0.00
								<b>Limited Total:</b>	\$366,204.00
								<b>Schoolwide Total:</b>	\$959,163.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Administration	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCS	\$541,714.00	
1	1.4	Paraprofessionals	Yes	Limited to Unduplicated Student Group(s)	English Learners Low Income	Specific Schools: BCCS	\$173,103.00	
1	1.5	Professional Development	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCS	\$250,293.00	
1	1.6	Core Instructional Materials & Licenses	Yes	Schoolwide	English Learners Foster Youth Low Income		\$87,356.00	
1	1.7	Technology	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income		\$189,425.00	
1	1.8	Local Assessments	Yes	Schoolwide	English Learners Foster Youth Low Income			

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	2.1	SFA Instructional Strategies for Skill Acceleration	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income		\$3,676.00	
3	3.2	Supplemental Curricula	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income			
4	4.1	Integrated and Designated ELD	Yes	Limited to Unduplicated Student Group(s)	English Learners			
4	4.2	Acceleration & Study Hall	Yes	Schoolwide	English Learners Foster Youth Low Income			
4	4.3	Expanded Learning Opportunities Summer Learning & Enrichment	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income			
5	5.1	Student Activities & Incentives	Yes	Schoolwide	English Learners Foster Youth Low Income		\$79,800.00	

## 2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$4,576,696.00	\$4,560,837.78

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Support to increase student academic achievement	Yes	\$517,243.00	547683
1	1.2	Teacher Retention: Coaching Support	Yes	\$206,404.00	178651
2	2.1	Parent Coordinator	Yes	\$67,454.00	\$67,454.00
2	2.2	Program Coordinator/Operations Team & School Culture Climate Team	Yes	\$338,181.00	379812
2	2.3	Student Activities	Yes	\$51,300.00	\$51,300.00
2	2.4	Enrollment and Outreach- "SCHOLA Services " and Increase ADA	Yes	\$18,000.00	\$18,000.00
3	3.1	Salaries and Benefits	No	\$2,787,441.00	\$2,654,925.58
3	3.2	Professional Development	Yes	\$48,573.00	\$48,573.00
3	3.3	Core Instructional Materials; Technology	No	\$144,926.00	\$144,926.00
3	3.4	Maintenance/Custodial/Security (2201)	No	\$317,516.00	\$360,000.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	3.5	Technology Enhancement	No	\$79,658.00	\$109,513.20

### 2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$1,086,436	\$1,038,635.00	\$1,061,295.00	(\$22,660.00)	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Support to increase student academic achievement	Yes	\$487,243.00	547683		
1	1.2	Teacher Retention: Coaching Support	Yes	\$206,404.00	238640		
2	2.1	Parent Coordinator	Yes	\$67,454.00	\$67,454.00		
2	2.2	Program Coordinator/Operations Team & School Culture Climate Team	Yes	\$188,234.00	\$118,218.00		
2	2.3	Student Activities	Yes	\$51,300.00	\$51,300.00		
2	2.4	Enrollment and Outreach- "SCHOLA Services " and Increase ADA	Yes	\$18,000.00	\$18,000.00		
3	3.2	Professional Development	Yes	\$20,000.00	\$20,000.00		

### 2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$2,590,033	\$1,086,436	0	41.95%	\$1,061,295.00	0.00%	40.98%	\$25,141.00	0.97%

# Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

# Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
  - Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

## Plan Summary

### Purpose



A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

## Requirements and Instructions

**General Information** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

**Reflections: Successes** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

**Reflections: Identified Need** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

**LCAP Highlights** – Identify and briefly summarize the key features of this year's LCAP.

**Comprehensive Support and Improvement** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## Engaging Educational Partners

## Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC Section 52064[e][1]*). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

## Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

### **Local Control and Accountability Plan:**

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1:** “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

**Prompt 2:** “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

**Prompt 3:** “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

**Focus Goal(s)**

**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

**Broad Goal**

**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

**Maintenance of Progress Goal**

**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal:** Explain how the actions will sustain the progress exemplified by the related metrics.

**Required Goals**

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

### Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.



Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2022–23</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

**Actions:** Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

**Actions for English Learners:** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year.



Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

### Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants:*** Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

**Projected Additional LCFF Concentration Grant (15 percent):** Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

**Projected Percentage to Increase or Improve Services for the Coming School Year:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

**LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar:** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year:** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

### **Required Descriptions:**

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools:** Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## For School Districts Only:

### Actions Provided on an LEA-Wide Basis:

**Unduplicated Percentage > 55 percent:** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

**Unduplicated Percentage < 55 percent:** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

## Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —



Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
  - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
  - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
  - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

## Contributing Actions Table



As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
  - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
  - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
  - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
  - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

### **LCFF Carryover Table**

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
  - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
January 2022

## LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Monsenor Oscar Romero Charter School

CDS Code: 19647330114959

School Year: 2023-24

LEA contact information:

Yvette King Berg

Executive Director

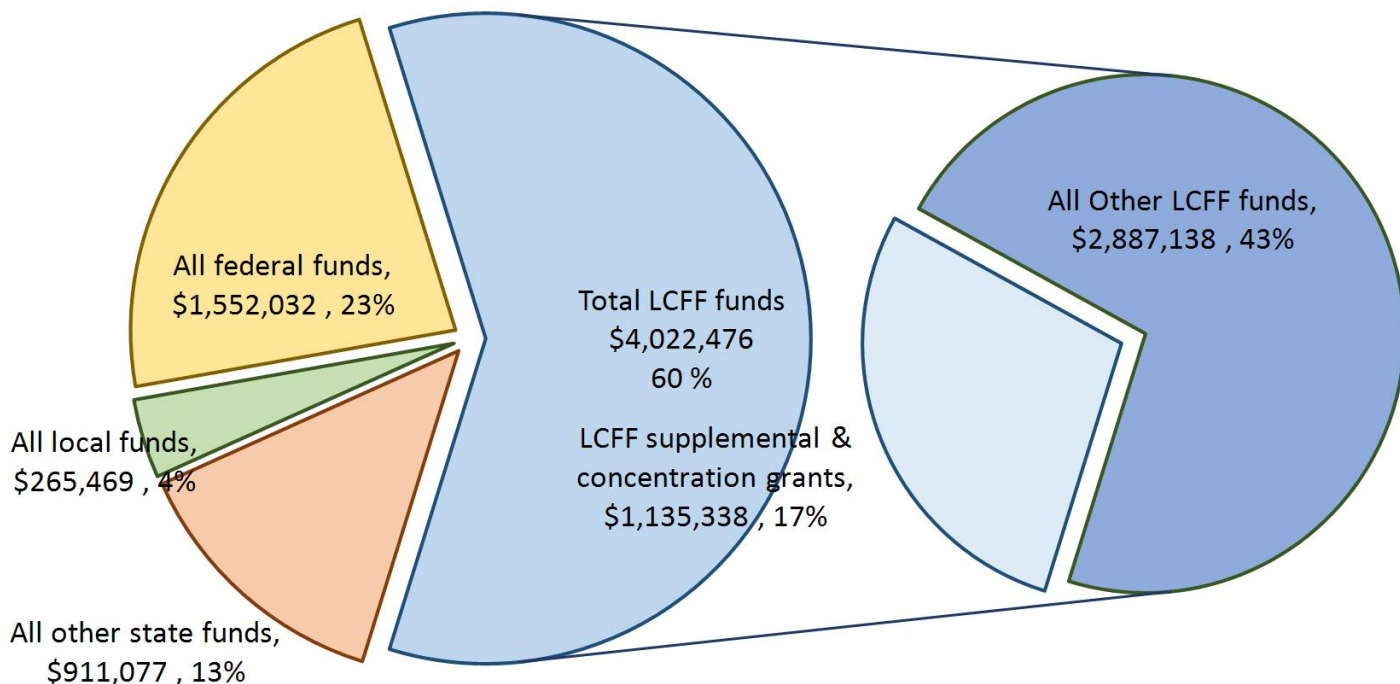
ykingberg@ypics.org

(818) 305-2791

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

### Budget Overview for the 2023-24 School Year

#### Projected Revenue by Fund Source

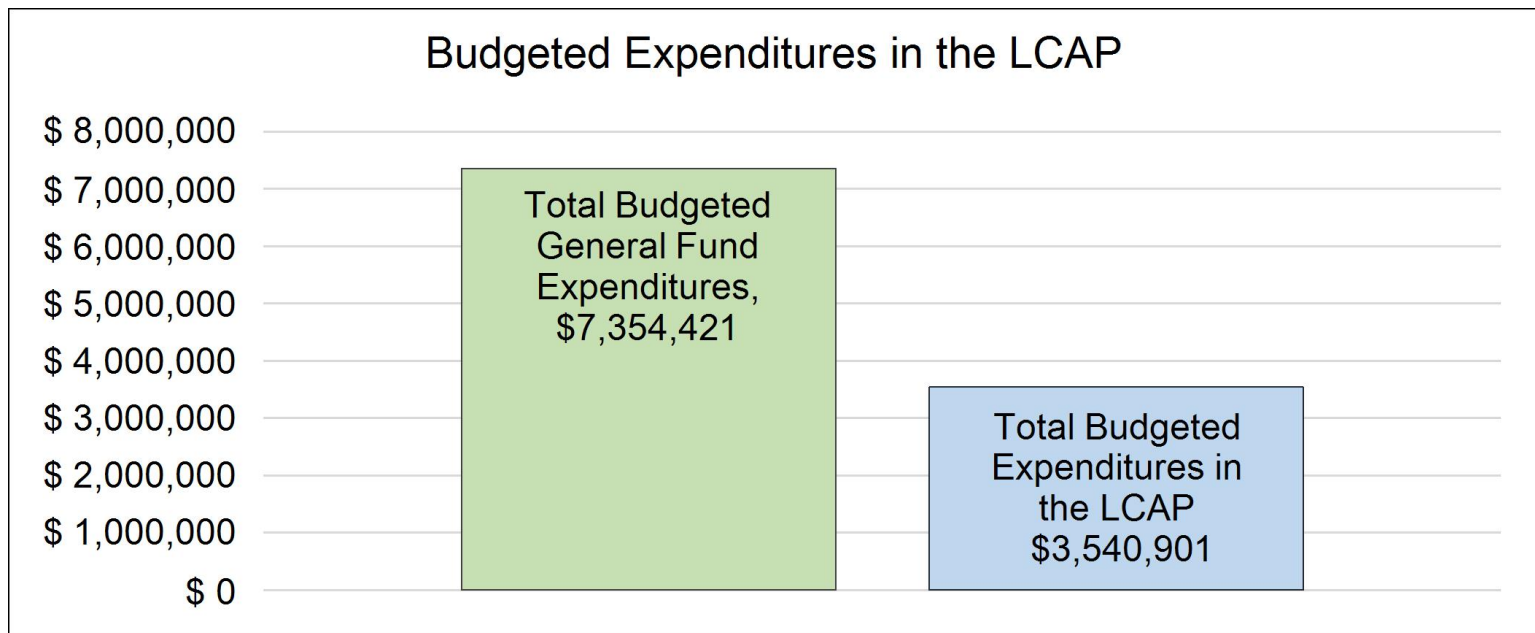


This chart shows the total general purpose revenue Monsenor Oscar Romero Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Monsenor Oscar Romero Charter School is \$6,751,054, of which \$4022476 is Local Control Funding Formula (LCFF), \$911077 is other state funds, \$265469 is local funds, and \$1552032 is federal funds. Of the \$4022476 in LCFF Funds, \$1135338 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

## LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Monsenor Oscar Romero Charter School plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Monsenor Oscar Romero Charter School plans to spend \$7354421 for the 2023-24 school year. Of that amount, \$3,540,901 is tied to actions/services in the LCAP and \$3,813,520 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

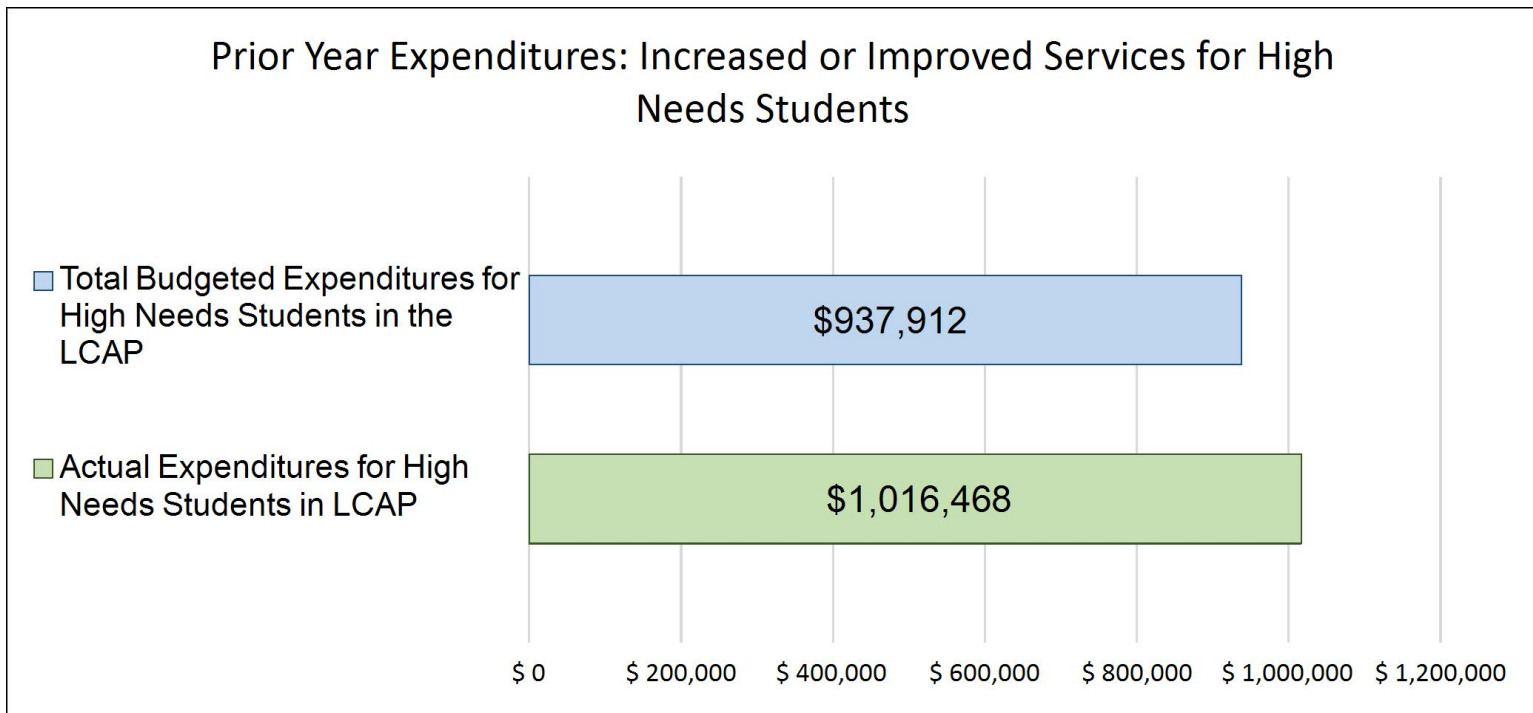
Funds not included in the LCAP consist of Child Nutrition, Special Education, Entitlement/Encroachment, Services & Other Operating Expenses, and Depreciation Expenses.

### Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Monsenor Oscar Romero Charter School is projecting it will receive \$1135338 based on the enrollment of foster youth, English learner, and low-income students. Monsenor Oscar Romero Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Monsenor Oscar Romero Charter School plans to spend \$1,160,475 towards meeting this requirement, as described in the LCAP.

## LCFF Budget Overview for Parents

### Update on Increased or Improved Services for High Needs Students in 2022-23



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

The text description of the above chart is as follows: In 2022-23, Monsenor Oscar Romero Charter School's LCAP budgeted \$937,912 for planned actions to increase or improve services for high needs students. Monsenor Oscar Romero Charter School actually spent \$1,016,468 for actions to increase or improve services for high needs students in 2022-23.



# Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Monsenor Oscar Romero Charter School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Plan Summary [2023-24]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Monseñor Oscar Romero Charter School (MORCS) a Youth Policy Institute Charter School (YPICS), serves 277 students in the San Fernando Valley area of Los Angeles County. Represented with 97.8% Latino, 1.4% White, 0.4% African American, 39.7% English Learners, 13% Students with Disabilities, and 89.9% Socioeconomically Disadvantaged. (Source: CDE DataQuest, Enrollment 2022-23)

**VISION:** Our school is named in honor of and inspired by Monseñor Oscar Romero Charter, a prominent Latino community organizer who dedicated his life to lead the struggle of poor immigrant communities in California and across the nation for social and economic justice. Above all, he never failed to give an eloquent and insistent voice to the cardinal importance of education. Monseñor Oscar Romero believed in the Jeffersonian ideal that democracy and its attendant ideals become quite impossible without an intelligent citizenry.

**MISSION:** The Monseñor Oscar Romero Charter School prepares urban students in grades 6-8 for academic success and active community participation. The school is located in the Pico-Union area of Los Angeles, California, an area fraught with poverty and academically struggling students. The majority of students attending schools in this area come from predominantly Latino immigrant families where Spanish is spoken in the home. Many area public school students are eligible for federal free or reduced meals, indicative of the high poverty levels in the area.

The Charter School also serves a wide range of scholars requiring a rigorous program that includes acceleration, differentiated instruction, depth, and complexity. The Charter School is a data-driven school that uses assessment data to understand and improve scholar and school performance. The assessment data (diagnostic, formative, and summative) helps the Charter School continuously plan, monitor, and improve academic programs. Staff reviews the previous spring's state testing results to evaluate the school's academic program and chart a course for the new year based on the students' needs. Subgroups in need of intervention are identified and monitored. In addition to state testing, other assessments include publisher assessments, student work samples, and i-Ready Diagnostic assessments.

Assessments are used to: Identify scholars and subgroups who need additional instruction or intervention; Prescribe a re-teaching or acceleration focus for individual scholars; Identify professional development needs and target school resources.

The Charter School's educators believe it is essential to take a multidimensional approach to meet the needs of our diverse population. The Charter School addresses the social and emotional needs of all students. Teachers analyze data to determine each student's unique talents and needs. Students who are on grade level and approaching proficiency are targeted in the critical instructional areas that propel them to advance in all areas. Students struggling with basic skills are provided grade-level instructional materials and targeted for support by various education experts that include access to Education Specialists, school psychologists, speech pathologists, classroom teachers, and administrators.

The Charter School created its own culture of awareness with considerate, committed, and conscientious teachers serving the needs of our scholars. Many visitors, including the LAUSD Charter Schools Division Executive Director and staff, as well as the US Department of Education representatives, and elected officials have recognized the positive culture at our Charter School.

## Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

### 2021-22 CA School Dashboard

- Suspension Rate Indicator (“Medium” 2.3% suspended at least one day) English learners (2.4%), Socioeconomically Disadvantaged (2.4%), Students with Disabilities (2.7%), Hispanic (2%).
- English Learner Progress Indicator (“High” 61% making progress towards English language proficiency)
- Local Indicators: All local indicators “Met” for 2022

### Local Data 2022-23

#### Performance of EL/SWD and Latino Student Groups

In looking at our subgroups, our Els, Students with Disabilities, Latino, and Socioeconomically Disadvantaged students made significant progress on their iReady diagnostics (verified data) throughout the school year (see table below). This is an indicator that many of the learning gaps are being closed and also serves as evidence that these subgroups are making progress toward reaching grade-level mastery. With the continued focus in their support classes, all students, including those listed under our significant student groups, will continue to improve academically and thus perform better in their CAASPP and iReady Diagnostic tests.

#### Expanded Learning Opportunities Program

Through ELOP, our teachers have been able to build community with our students and encourage them to engage in activities with their peers. We see this as an important step in helping students realize their full potential and excel in school. All of our clubs and sports teams have been led by our teaching staff and they have all stated that it has helped them build stronger relationships both in and out of the

classroom with their students. The result has led to a strong culture and has built trust among our students and teachers, allowing them to grow as active citizens and lifelong learners as they engage and participate in different clubs and sports teams.

We believe that the combination of academic supports and a strong support system across the school will help to increase our overall scores. We are already seeing great results on our iReady test scores and are confident that our students will continue to excel as scholars with continued engagement in academics and extracurricular activities.

## Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

### 2021-22 CA School Dashboard

- Chronic Absenteeism Indicator (“Very High” 30% chronically absent) African American (42.9%), American Indian (42.9%), English Learners (33.6%), Foster Youth (42.1%) Hispanic (35.8%), Homeless (45.1%), Socioeconomically Disadvantaged (37.4%), Students with Disabilities (39.6%), White (21%).

Overall, post-pandemic, we have seen an increase in chronic absenteeism which has been concerning. As a school, MORCS has focused on improving attendance rates and has implemented systems to communicate with students and families when they are in danger of falling into the category of Chronically Absent. Our leadership team has brainstormed ideas to improve our attendance rates. Each member of our site leadership team plays an essential role in ensuring that we each contribute and support families when they need assistance to improve their student’s attendance. As a school, we run attendance reports to determine which students are in the chronically absent range. Once we have determined who those students are, we request to meet with the family to discuss why their child has been missing school. We have often found that students struggle with social and emotional needs. In these cases, we connect them to our on-site counselor, and if deemed necessary, we connect them with one of our counseling service providers who can provide more intensive support. This allows students to communicate with adults and discuss their social and emotional needs. Suppose students continue to miss school through unexcused absences. In that case, we conduct home visits by our school community coordinators to have a more in-depth conversation with families about the importance of attendance.

Additionally, the role of the school community coordinator is to identify additional community resources to support parents who are also struggling due to the pandemic. Our first tiers of support are working, and we have not had to resort to home visits lately. However, supports are in place as an option for our extreme cases. In addition to our attendance data review and connection to school resources, we offer incentives like free-dress day passes and donut celebrations for students who exhibit excellent attendance. We have found this to be a good motivator for students who struggle with wanting to come to school.

- English Language Arts Indicator (“Low” -63.1 below standard): “Very Low” student groups were English Learners (-105.1 DFS ) and Students with Disabilities (-117.1 DFS ); “Low” student groups were Hispanic (-63.5 DFS ) and Socioeconomically Disadvantaged (-63.7 DFS )

- Mathematics Indicator (“Very Low” -115.8 points below standard): “Very Low” student groups were English Learners (-153 DFS), Hispanic (-115.8 DFS), Socioeconomically Disadvantaged (-117.8 DFS), Students with Disabilities (-156.2 DFS)

### Local Data 2022-23

#### Support Classes

After reviewing data sets from our authorizer, it was clear that we had to put together an action plan for the 22-23 school year to ensure that we were strategically filling academic gaps throughout the school year. This year, we created support classes where students were grouped based on academic needs. Our teachers had time to review CAASPP and iReady data at the start of the school year and create groups that enabled them to provide academic support in small-group settings. Our support classes are at under 20 students per group, and teachers are strategically using resources from the iReady program to target learning gaps in the classroom. These groups see each other daily for 50 minutes. In December 2022, our team was able to look at the data from their second diagnostic and move students around accordingly so that they were placed in classes that supported their greatest academic needs. Our support classes include Math Support, English Support, History Support, and Science Support.

Additionally, we are using our advisory classes to have social-emotional and academic check-ins with our students—allowing our teachers to conference with our students and ask them about how they feel regarding their academic growth and progress. This check-in during advisory is particularly helpful to our EL students and our students with special needs as they can connect with their teacher in a one-on-one setting. One of the programs that we have been using in advisory this year is Sown to Grow. The program allows us to create check-in questions focused on social-emotional and academic needs. Teachers can see student responses, and our administrative team receives notifications if students indicate that they are struggling social-emotionally, which we forward to our counselor, who then checks in with students to provide the necessary support.

Additionally, we’ve structured our advisory program to serve as a class that allows students to engage in goal setting, community circles, 1-on-1 check-ins, and journaling. The purpose of advisory this year has been to build community with students; to ensure that every student has a staff advisor that will look out for their overall academic and socioemotional needs; to provide students with wraparound supports, guidance, and skills to be successful in school and later in career and life.

## LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

The prior year’s LCAP contained three goals:

Goal 1: Increase Student Achievement

Goal 2: Increase meaningful and purposeful student, teacher, and parent engagement.

Goal 3: Provide an appropriate Basic Condition for Learning

Based on analysis of the 2022 CA Dashboard and consultation with our educational partners, it was determined that the 2023-24 LCAP should be expanded to five goals:

**Goal 1 Conditions of Learning** Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff. (State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)

**Goal 2 Annual Growth & Achievement in English Language Arts**

Increase student achievement in English/Language Arts - Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth. (State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)

**Goal 3 Annual Growth & Achievement in Mathematics & Science**

Increase student achievement in Mathematics and Science - Maintain high standards for our community to engage students in high levels of achievement in mathematics through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth. (State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)

**Goal 4 Growth & Achievement for English Learners and At-Promise Students**

Annual growth for English Learners and special student groups - Ensure English learner students are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science. (State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)

**Goal 5 School Culture & Climate**

Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes. (State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)

Additionally, to provide increased transparency and alignment to the LCFF State Priorities, several metrics have been added.

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

MORCS was not identified for CSI by the CDE.

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not applicable.

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not applicable.

# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

YPI-MORCS seeks to provide multiple opportunities to engage its educational partners and sustain their involvement throughout the academic year. Our community partners are integral to ensuring our educational program successfully meets the needs of the students we serve.

Parents: Youth Truth Survey (October), Coffee with the Director (12/7/23, 2/8/23, 4/12/23), Parent Workshops, Community Data Walks (February 2023), School Advisory Council meetings, on-going parent access to student progress/communications via Infinite Campus

Students: Youth Truth Survey (October), advisory class

Administrators, Teachers & Staff: Youth Truth Survey (October), Professional Development, Community Data Walks (February 2023)

In 2022 the school was awarded a California Community Schools Partnership Program Planning Grant. Total funding of \$200,000 supported with hiring a Coordinator of Community Schools (CoCS), contract services for data analyses, teachers/staff stipends, parent capacity development, and teacher/staff professional development.

School Community engagement kicked off in August 2022 with an overview of the CA community school framework and the YPICS vision for its community school to teachers and staff during the beginning of the school year professional development days. Followed by parent-teacher conferences, workshops, SAC/ELAC meetings, Café con Los Directors, and community events during the months of September - December 2022. During parent-teacher conferences, CoCS introduced the community school framework and the LCAP to parents and an overview of the assets and needs assessment work ahead. In October and November, families were engaged via annual events like Trunk-or-Treat, Día De Los Muertos, and College & Career Parent workshops.

To understand the needs and gaps the evaluation team conducted sensemaking sessions with the community to better understand the experiences of youth, administrators, teachers, and families. The evaluation team analyzed all the data collected from October 2022 to January 2023 and shared it with the community. The purpose was to ask about their reactions and experiences with the data. In addition, to pose back to the community the needs shared in all the data and have them select their top three interests in school investments. The intended purpose of hosting sensemaking meetings was to share the data collected from the community and collectively analyze it as a team and to inform the LCAP and the implementation plan for the school. Upon completion of all assessment activities, priority topic areas were identified for the school and will be the areas to focus on by aligning resources, strategies, and partnerships.



### A summary of the feedback provided by specific educational partners.

To address the needs of our community school, the school undertook a comprehensive community school planning process that included asset mapping (reviewing of the LCAP), a needs assessment and gap analysis, and a heavy emphasis on engagement with and leadership by the school community, including students, families, staff, teachers, administrators, partners, and area residents.

Community School and LCAP needs assessment activities occurred throughout the year. These included YouthTruth Survey and Focus Groups with stakeholders. In-person focus groups were conducted with students, teachers, and families at each school across grade levels and positions (instructional and supportive staff) SAC/ELAC members to gain a more holistic understanding of the strengths and challenges of our school. Key Informational Interviews with staff and teachers and in-person interviews were conducted with school administrators and teachers to assess successes and challenges with the school culture and the range of services offered at the school. Focus groups explored topics like what makes them feel welcome/unwelcome on campus, what makes them feel successful as learners and teachers in their vision for a "community school," if they feel engaged in decision-making, how the school can build more trusting relationships, and what support services are needed.

All assessment activities examine needs and gaps in services and school and community assets and resources that can be integrated as part of our community school. The input of stakeholders has been instrumental in developing our school's LCAP and the Community Schools Implementation Plan.

In April and May, the LCAP was drafted and ready for input from University and LAUSD Partners (LMU, UCLA, and Charter Operated Programs Options Staff) LMU reviewed the plan specifically for EL Actions and ensured that the school has a way to manage a comprehensive EL Master plan aligned the CA Roadmap for ELs. UCLA reviewed Social-emotional support for counseling services, and Charter Operated Programs reviewed actions for students with disabilities (tiered and tutoring supports).

The YPICS Board held a public hearing/update for input from both the board and the public on June 5, 2023.

### A description of the aspects of the LCAP that were influenced by specific input from educational partners.

The following are aspects of the LCAP that stakeholders influenced.

#### Focus on Essential Standards (Learning Outcomes/Indicators)

- Identify/revise essential standards for each grade/course;
- Ensure all students have access to grade-level Essential Standards and materials;
- Identify students who need additional support to accelerate learning and to mitigate pupil learning loss;
- Schedule time for students experiencing pupil learning loss.

All feedback collected throughout the above process resulted in the LCAP actions which are aligned with the YPICS vision to improve



Cornerstone Commitments of Community Schools: A commitment to assets-driven and strength-based practices for all stakeholders; A commitment to racially just and restorative school climates; A commitment to powerful, culturally proficient, and relevant instruction; and a commitment to shared decision-making and participatory practices to improve student achievement and outcomes.

# Goals and Actions

## Goal

Goal #	Description
1	<p>Goal 1. Conditions of Learning</p> <p>Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff.</p> <p>(State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)</p>

An explanation of why the LEA has developed this goal.

While the prior LCAP contained a goal similar to this new goal, it was all encompassing and left members of the community overwhelmed with the combination of academic progress data AND basic conditions of learning. The new goal was created for the 2023-24 LCAP to allow for a separation of these two areas.

As discussed in the Educational Partner Engagement section, the implementation of the community-wide Data Walks, we want to ensure there is a clear understanding of the basic enabling conditions that are necessary to be in place for students to experience not only continued academic growth, but also safety and an environment which nurtures/supports their social emotional needs as well.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teaching Credentialing and appropriate EL authorization; all teachers will be	100% All classroom teachers hold a valid CA Teaching Credential as defined by the CA Commission on Teaching Credentialing and have appropriate EL authorization. All teachers were	40.8% Clear (Source: CDE DataQuest, 2020-21 Teaching Assignment Monitoring Outcomes by Full-Time Equivalent 2020-21)	TBD - 2021-22 Teaching Assignment Monitoring Outcomes		All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization; all teachers will be appropriately assigned
		[NOTE: Originally reported as “100% of classroom teachers will hold a valid CA			

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
appropriately assigned. Priority 1 Basic Services	appropriately assigned.	Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization. All teachers appropriately assigned.”]			
Access to standards-aligned curricular and instructional materials Priority 1 Basic Services	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% teachers/students with access to standards- aligned curricula (ELA, 100% teachers/ students with access to standards- aligned curricula (ELA, ELD, math, science, social science, and social science) (Source: As reported in the 2023 Local Indicators Self Reflection Tool, May 2023)		100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)
Implementation and sustainability of academic content standards, as measured by the Local Indicator Rubric on the California	Same as Year 2 Outcome	N/A	Implementation of State Standards 2023  ELA 5 ELD 5 Math 5 NGSS 5 History 5		Implementation of State Standards  ELA 5 ELD 5 Math 5 NGSS 5 History 5

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Accountability Dashboard Priority 2 Implementation of adopted State Standards			CTE 5 Health 5 Phys. Ed 5		CTE 5 Health 5 Phys. Ed. 5
Teachers will participate in ongoing research-based professional development in the areas of English Language Arts, Math, Next Generation Science Standards (NGSS), English Language Development (ELD), Technology, and Differentiated instruction to meet the needs of all students and subgroups. Priority 2 Implementation of adopted State Standards	100% Teachers participated in professional development throughout the physical closure of the Charter School.	~90% of teachers participated in professional development 21-22	100% of teachers participated in professional development for 22-23		100% Teachers participating in professional development
Student Access to a Broad Course of Study Priority 7 Course Access	100% of students have access to a broad course of study	100% of students have access to a broad course of study	100% of students have access to a broad course of study		100% of students have access to a broad course of study

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		CA Dashboard Local Indicator “Met” (Source: CDE, CA School Dashboard 2022)	CA Dashboard Local Indicator “Met” (Source: As reported in the Local Indicators 2023 Self-Reflection Tool)		
School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists	100% The Charter School developed a cleaning regiment based on best practices for reopening schools	100% of facilities clean and maintained in good repair	Overall Facility Rating as measured by FIT “Exemplary” (Source: As reported in the SARC, February 2023)		School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Facility, Maintenance, Custodial & Security	Costs associated with facility/maintenance and security. Custodial staff will ensure facilities are clean and maintained in good repair through daily checks and Site Inspection Lists with >90% of items meeting the "good" standard or better.	\$212,310.00	No
1.2	Administration	Costs associated with the salaries and benefits for administrative staff positions include: Executive Administrator, Operations Coordinator, Parent Coordinator, Community Schools Coordinator, and School Climate & Culture Coordinator. The School Climate & Culture Team will continue quality implementation of the PBIS Framework and programs.	\$983,068.00	Yes

Action #	Title	Description	Total Funds	Contributing
1.3	Credentialed Classroom Teachers	Costs associated with the salaries and benefits for certificated staff to provide standards-based instruction to all students in grades 6-8.	\$1,367,211.00	No
1.4	Paraprofessionals	Costs associated with full-time paraprofessionals for Special Education and instructional aides for general education	\$180,699.00	Yes
1.5	Professional Development	<p>Professional Development for all staff members (Pre-service &amp; On-going) topics include, but are not limited to:</p> <p>RE/LAY Graduate School of Education - Continue training for leaders and teachers to sustain the school vision for high-impact instruction and provide a common framework for coaching, observation and feedback. This allows for a common language and understanding of instructional expectations that are rooted in equity for all students. (School share of cost \$10,000 = 1/3)</p> <p>Critical Friends Group Training to establish and sustain a foundation focused on continuous improvement. The National School Reform Faculty program will be the professional partner for schoolwide training. (School share of cost \$18,317 = 1/3)</p> <p>Universal Design for Learning (UDL) training for administration and staff to create flexible learning environments and learning spaces that can accommodate individual learning differences.</p> <p>Backwards Design training prioritizing the intended learning outcomes instead of topics to be covered, and most importantly facilitating student learning.</p> <p>BTSA Training/ New Teacher Support (Title 2)</p> <ul style="list-style-type: none"> <li>• Standards-Based Grading</li> <li>• Project-Based Learning</li> <li>• Service-Learning</li> </ul>	\$325,229.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<p>Equity-focused Standards-based Instruction</p> <ul style="list-style-type: none"> <li>• Building Positive Relationships (teacher-student; teacher-family; school-home) and sustaining an inclusive culture based on respectful communication</li> <li>• ELD strategies for English Learners to access grade-level core curriculum/impact academic growth</li> <li>• CCSS and core standards in ELA, ELD, mathematics, Next Gen Science Standards (NGSS), and social sciences</li> </ul> <p>Supporting the Growth of English Learners &amp; Dually-Identified Students</p> <ul style="list-style-type: none"> <li>• Quality implementation of the English Learner Master Plan aligned to the CA English Learner Roadmap</li> <li>• Implementation of strategies to support EL acquisition/mastery of the English language (speaking, listening, reading, writing)</li> <li>• Understanding the language needs of ELD in acquisition of academic language</li> <li>• Strategies for supporting Students with Disabilities in the general education classroom</li> <li>• Training and use of Success For All instructional strategies to ensure students receive support in the development of foundational skills that posed barriers to accessing grade-level standards-based instructional content</li> </ul> <p>Standards-based Instruction</p> <ul style="list-style-type: none"> <li>• ELD strategies for English Learners to access grade-level core curriculum/impact academic growth</li> <li>• CCSS and core standards in ELA, ELD, mathematics, Next Gen Science Standards (NGSS), and social sciences</li> <li>• Instructional shifts for maintaining rigorous instruction (lesson design, "big ideas", essential questions, academic discourse, close reading, text-dependent questions, etc.)</li> <li>• Curricular-specific trainings (for core and use of iReady, Infinite Campus, Thinking Nation, writing assessments)</li> </ul>		

Action #	Title	Description	Total Funds	Contributing
		<ul style="list-style-type: none"> <li>• Engaging and empowering students through deeper instruction</li> </ul> <p>Multi-tiered System of Support</p> <ul style="list-style-type: none"> <li>• Use of internal data sources to drive decisions/recommendations for academic acceleration and progress monitoring</li> <li>• Positive Behavior and Intensive Support (PBIS) and alternatives to suspension</li> </ul> <p>Building Positive Relationships (teacher-student; teacher-family; school-home) and sustaining an inclusive culture based on respectful communication</p>		
<b>1.6</b>	Core Instructional Materials & Licenses	Costs associated with the on-going use of: iReady ELA and Mathematics textbooks, eTextbooks for NGSS (annual licenses), History Alive (student licenses for eTexts), Thinking Nation platform for access to primary source documents, Google Classroom Suite	\$72,825.00	Yes
<b>1.7</b>	Technology	Technology provided to all students. Based on the Technology Plan developed for cycling out/replenishing student devices.	\$231,638.00	Yes
<b>1.8</b>	Local Assessments	Students will be assessed 3xs per year using the state-verified iReady assessment suite in ELA and math. This data will be used by all teachers to gauge the needed additional supports needed in order to accelerate the acquisition of foundational skills which are necessary for accessing grade-level content.		Yes



## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
2	<p>Goal 2. Annual Growth &amp; Achievement in English Language Arts</p> <p>Increase student achievement in English/Language Arts</p> <p>Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.</p> <p>(State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-MORCS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the ELA-specific goal for increased transparency for all.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase student achievement in English/Language Arts as measured by the SBAC Priority 4 Pupil Achievement	<p>SBAC ELA 2019 Met/Exceeded</p> <p>22.2% All (-73.7 DFS)</p> <p>22.2% Latino (-73.9 DFS)</p> <p>21.8% SED (-74.1 DFS)</p>	<p>N/A</p> <p>CA Dashboard 2021 – Not published due to COVID</p>	<p>SBAC ELA 2022 Met/Exceeded</p> <p>23.8% All (-63.1 DFS)</p> <p>23.3% Latino (-63.5 DFS)</p> <p>23.7% SED (-63.7 DFS)</p>		Annually decrease the negative DFS and improve the percentage of students demonstrating growth on SBAC ELA standards
Increase the percentage of students demonstrating growth on Local ELA	Same as Year 2 Outcome	N/A	<p>iReady Reading Growth 2022-23</p> <p>Grade 6</p> <p>57% Annual Typical</p>		Increase students demonstrating growth and improving level placement on local iReady assessment

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes			22% Annual Stretch 59% Improved Placement  Grade 7 50% Annual Typical 21% Annual Stretch 46% Improved Placement  Grade 8 63% Annual Typical 27% Annual Stretch 65% Improved Placement		

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	SFA Instructional Strategies for Skill Acceleration	Applying the training that has been provided, classroom teachers will apply SFA instructional strategies to address foundational literacy needs of students. The primary setting for the use of the strategies during the regular instructional day in order to accelerate the closing skill gaps in ELA, while providing grade-level access to content standards.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
3	<p>Goal 3. Annual Growth and Achievement in Mathematics &amp; Science                      Increase student achievement in Mathematics and Science                      Maintain high standards for our community to engage students in high levels of achievement in mathematics through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.                      (State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-MORCS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the math/science-specific goal for increased transparency for all. Math is an ongoing area for growth as our students continue to face challenges with foundational skills while simultaneously needing to access/excel in grade-level standards.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Student achievement in Mathematics as measured by the SBAC Priority 4 Pupil Achievement	SBAC Math 2019 % Met/exceeded  10.98% All Students (-119.8 DFS) 10.84% Latino (-120.3 DFS) 10.94% SED (-120.3) (Source: CA School Dashboard)	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC Math 2022 % Met/exceeded  10.25% All Students (-115.8 DFS) 9.97% Latino (-115.8 DFS) 10.08% SED (-117.8) (Source: CA School Dashboard)		Annually decrease the negative DFS and improve the percentage of students demonstrating growth on SBAC Math standards

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase the percentage of students demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Math Growth 2022-23  Grade 6 64% Annual Typical 22% Annual Stretch 62% Improved Placement  Grade 7 57% Annual Typical 13% Annual Stretch 58% Improved Placement  Grade 8 58% Annual Typical 27% Annual Stretch 59% Improved Placement		Increase students demonstrating growth and improving level placement on local iReady assessment
Next Generation (Science) as measured by CAST Priority 4 Pupil Achievement	CAST 2019  Met/exceeded 7.77% All 7.77% Latino 8.25% SED  Nearly Met 60.2% All 60.2% Latino 59.8% SED	N/A	CAST 2022  Met/exceeded 9.73% All 8.93% Latino 10.5% SED  Nearly Met 61.1% All 61.6% Latino 59.1% SED		Annually decrease %age of "Nearly Met"

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Acceleration & Study Hall	<p>Acceleration: Credentialed teachers provide academic support and lessons either before or after school targeted for students performing 1-2 grade levels below on their diagnostic assessments. The lessons specifically targeted at learning gaps identified in their classroom assessments and by the iReady diagnostic (math and reading).</p> <p>Study Hall: Facilitated by a certificated teacher, study hall is focused on iReady pathway completion and re-do mastery assignments. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]</p>		No
3.2	Supplemental Curricula	Use of IronBox to address students' math fluency needs which are a barrier to access of grade-level content. Costs associated with this action include materials and math teacher training.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**



# Goals and Actions

## Goal

Goal #	Description
4	Goal 4. Growth and Achievement for Special Student Populations Ensure Socioeconomically Disadvantaged, English learners and Students with Disabilities are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science. (State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)

An explanation of why the LEA has developed this goal.

This is a new goal for the 23-24 LCAP to focus on the achievement of our special populations.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
English Learner Progress Indicator – ELs making progress towards English language Proficiency (ELPI) Priority 4 Pupil Achievement	52.8% making progress towards English language proficiency (Source: 2019 CA School Dashboard)	N/A  CA Dashboard 2021 – Not published due to COVID	61% making progress towards English language proficiency (Source: 2022 CA School Dashboard)		Annually increase English learner growth in English proficiency as measured by the CA Dashboard English Learner Progress Indicator (ELPI)
English learner proficiency as measured by ELPAC Priority 4 Pupil Achievement	11.96% Proficient 38.04% Level 3 34.78% Level 2 15.22% Level 1  (Source: English Language Proficiency)	11.58% Proficient 32.63% Level 3 34.74% Level 2 21.05% Level 1  (Source: English Language Proficiency)	18.42% Proficient 42.98% Level 3 20.18% Level 2 18.42% Level 1  (Source: English Language Proficiency)		Continue to increase the number of English Proficiency as measured by ELPAC

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	for Summative ELPAC 2018-19)	for Summative ELPAC 2020-21)	for Summative ELPAC 2021-22)		
Reclassification Rate of EL to RFEP Priority 4 Pupil Achievement	16.7% Reclassification Rate (Source: DataQuest CDE 2018-19)	4.4% Reclassification Rate (Source: DataQuest CDE 2019-20)	TBD - Reclassification Rate for 2021-22 pending		Annually increase reclassification of English learners
SWD/SED/ELs student achievement in English/Language Arts as measured by the SBAC Priority 4 Pupil Achievement	SBAC ELA 2019  SWD (-133 DFS) 2.56% Met/exceeded 17.95% Nearly Met 79.49% Not met  EL (-100.7 DFS) 0% Met/exceeded 16.85% Nearly Met 83.15% Not met	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC ELA 2022  SWD (-117.1 DFS) 9.38% Met/exceeded 28.13% Nearly Met 62.5% Not met  SED (-63.7 DFS) 23.68% Met/exceeded 34.96% Nearly Met 41.35% Not met  EL (-105.1 DFS) 5.41% Met/exceeded 26.13% Nearly Met 68.47% Not met		Annually decreasing the percentage of ELs/SWD “Not Meeting” and increase percentage of “Meeting/Exceeding”
Increase the percentage of SWD/SED/ELs demonstrating growth on Local ELA Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Reading Growth 2022-23  ELs 53% Annual Typical Growth xx% Annual Stretch Growth		Annually increase percentage of SWD, SED, and English learners demonstrating growth in reading as measured by local assessments in ELA

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
			xx% with Improved Placement  SED xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  SWD 68% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement		
SWD/SED/ELs student achievement in Math as measured by the SBAC Priority 4 Pupil Achievement	SBAC Math 2019  SWD (-197.1 DFS) 2.56% Met/exceeded 7.69% Nearly Met 89.74% Not met  EL (-147.7 DFS) 0% Met/exceeded 4.6% Nearly Met 95.4% Not met	N/A	SBAC Math 2022  SWD (-156.2 DFS) 9.38% Met/exceeded 12.5% Nearly Met 78.13% Not met  SED (-117.8 DFS) 10.08% Met/exceeded 25.37% Nearly Met 64.55% Not Met  EL (-153 DFS) 0.89% Met/exceeded 14.29% Nearly Met 84.82% Not met		Annually decreasing the percentage of ELs/SWD “Not Meeting” and increase percentage of “Meeting/Exceeding”

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase the percentage of SWD/SED/ELs demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	iReady Math Growth 2022-23  ELs 55% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  SED xx% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement  SWD 52% Annual Typical Growth xx% Annual Stretch Growth xx% with Improved Placement		Annually increase percentage of SWD and English learners demonstrating growth in math as measured by local assessments
Next Generation (Science) as measured by CAST for SWD/SED/ELs Priority 4 Pupil Achievement	CAST 2019  SWD 5.88% Met/exceeded 29.41% Nearly Met 64.71% Not met		CAST 2022  SWD 0% Met/exceeded 46.15% Nearly Met 53.85% Not met		Annually decreasing the percentage of ELs/SWD “Not Meeting” and increase percentage of “Meeting/Exceeding”

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	<p>SED 8.25% Met/exceeded 59.79% Nearly Met 31.96% Not met</p> <p>EL 0% Met/exceeded 38.24% Nearly Met 61.76% Not met</p>		<p>SED 10.47% Met/exceeded 59.05% Nearly Met 30.48% Not met</p> <p>EL 0% Met/exceeded 42.11% Nearly Met 57.89% Not met</p>		

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	Integrated and Designated ELD	<p>Designated ELD will be provided to ELs in alignment with their level of English development. Students will also be provided support during core instruction using push-in and through pull-out time for ELs. Moreover, the EL teacher provides instruction in the resource classrooms and our resource teachers co-teach with her once or twice a week. This provides much more time for support for our ELs and students who are both EL and SPED.</p> <p>[NOTE: Costs associated with this action are materials and the purchase of the Ellevation platform to manage EL instruction, progress and program compliance. Any staffing costs are captured in Goal 1.]</p>	\$69,721.00	Yes
4.2	Acceleration & Study Hall	<p>Acceleration: Credentialed teachers provide academic support and lessons either before or after school targeted for students performing 1-2 grade levels below on their diagnostic assessments. The lessons specifically targeted at learning gaps identified in their classroom assessments and by the iReady diagnostic (math and reading).</p>		No

Action #	Title	Description	Total Funds	Contributing
		Study Hall: Facilitated by a certificated teacher, study hall is focused on iReady Pathway completion and re-do mastery assignments. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]		
4.3	Expanded Learning Opportunities Summer Learning & Enrichment	Scholars identified from the targeted LCFF student groups will be granted priority enrollment. This extended instructional time will occur during the summer to address learning loss and address the academic barriers to grade-level standards. The costs associated with this action include supplies, materials, summer stipends for teachers and school tutors.		Yes

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
5	<p>Goal 5. Positive School Climate &amp; Culture</p> <p>Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes.</p> <p>(State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)</p>

An explanation of why the LEA has developed this goal.

This goal has been developed starting with the 2023-24 academic year to have a more holistic approach to student/family engagement and its impact on the indicators of satisfaction and connectedness. Specifically, MORCS has witnessed an increase in chronic absenteeism since the pandemic and as a community we seek to meaningfully engage the families to foster a deeper understanding of the importance of regular school attendance and its impact on student achievement. We see our efforts are working in the area of on-site safety and positive climate as our suspensions have declined schoolwide. We believe our engagement of parents and fostering positive school-home relationships to be the key to increasing the number of students we have in regular attendance.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
School efforts to increase Parent involvement through input in decision-making via board meetings, SAC/ELAC, and engagement through workshops/trainings Priority 3 Parental Involvement	Same as Year 2 Outcome	N/A	10 Board Meetings held 10 SAC/ELAC meetings held		<p>Maintain monthly meetings of the Board of Directors and SAC/ELA</p> <p>Maintain monthly Monthly Parent Trainings/ Workshops to promote college awareness/attendance</p>



Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase parent participation rate on parent survey Priority 3 Parental Involvement	Same as Year 2 Outcome	N/A	50% Parent Participation 92% Input in decision-making 84% Satisfaction		Annually improve parent survey participation rate and ratings of satisfaction
Increase student participation rate on student survey and positive ratings (School Safety & Connectedness) Priority 5 Student Engagement /Priority 6 School Climate	Same as Year 2 Outcome	N/A	77% Student Participation 64% Belonging 92% Relationships		Annually improve student survey participation rate and ratings by students
Increase teacher participation rate on school survey Priority 6 School Climate	Same as Year 2 Outcome	N/A	35% Staff Participation 100% Relationships/ School Culture		Annually improve teacher survey participation rate and ratings of satisfaction
Decrease Chronic Absenteeism rate Priority 5 Student Engagement	2019 Chronic Absenteeism  6.8% All 12.2% SWD 10.6% EL 6.9% Latino 6.9% SED	(ADA and enrollment dropped due to COVID-19 absences and due to operating in the hardest-hit county, city, and community with the highest cases, highest, hospitalizations, and highest death rates in the community).	2022 Chronic Absenteeism Indicator "Very High"  20.1% All 18.9% SWD 21.3% EL 20.3% Latino 19.9% SED		The school will annually decrease and maintain a chronic absenteeism rate below 6.8%.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Suspension Rate Priority 6 School Climate	2019 Suspension Rate  12% All 14.6% SWD 13.8% EL 6.9% Latino 12.7% SED	<1% suspension and expulsion rate Due to COVID-19 Attendance Committee specific vision and goal(s) for outreach (2021-22). and enrollment in 22- 23. The team continues to address the issues and have a detailed action plan and/or a marketing strategy calendar which includes quarterly check-ins to ensure that the implementation is successful	2022 Suspension Rate Indicator "Medium"  2.3% All 2.7% SWD 2.4% EL 2% Latino 2.4% SED		The school will decrease and maintain a suspension rate below 0.5%.
Expulsion Rate Priority 6 School Climate	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate (Source: Ed-Data, 2022)		The school will continue to maintain an expulsion rate below 1%.
Dropout Rate Priority 5 Student Engagement	Same as Year 2 Outcome	N/A	0% MS Dropout Rate		Maintain a middle school dropout rate <1%
Increase Average Daily Attendance Priority 5 Student Engagement	School will continue to maintain ADA rate at or above 97.4%	Use a (2019-20), to 318 strategic planning process to identify a (2020-21), to 295 specific vision and goal(s) for outreach (2021-22), and enrollment in 22-23.	92% (P-2 Attendance 2022-23)		School will continue to maintain ADA rate at or above 97.4%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		<p>The team continues to address the issues and have determined a detailed action plan and/or a marketing strategy calendar which includes quarterly check-ins to ensure that the implementation is successful.</p> <p>The school is on target to increasing ADA and enrollment is up by 60 students, more than 20 students above at the same time last year. (ADA and enrollment have dropped due to COVID-19 absences and due to operating in the hardest-hit county, city, and community with the highest cases, highest hospitalizations, and highest death rates in the community).</p>			

## Actions

Action #	Title	Description	Total Funds	Contributing
5.1	Student Activities & Incentives	The school leadership will work with teachers/advisory course leaders to develop system of activities to promote student engagement and incentivize improvement in metrics identified with school culture/climate including attendance, positive behaviors, academic improvement/growth. The work of the School Climate/Culture Team as well as the Parent Coordinator will align to maximize positive climate and engagement. Team building, school trips (e.g. aligned to educational standards and/or college-going) and cultural events (to underscore our commitment to diversity) will support these efforts in establishing/maintaining a positive school climate.	\$48,200.00	No
5.2	Enrollment and Outreach- Schola	Ensure that all parents have on-boarding support from first point of LEA interest and contact through training to use all communications and technology systems to support their child's education at the charter school.	\$50,000.00	No
5.3	Parent/ Guardian Engagement	The Coordinator of Operations will assist with planning and implementation of the annual activities for meaningfully engaging parents/guardians to support the success of their child at MORCS. At minimum, these activities include meetings of the School Advisory Council, English Learner Advisory Committee, back to school night, parent conferences, IEP meetings		Yes
5.4	Home/School Communications & Feedback	Use of Infinite Campus to provide cohesive system of schoolwide communications in various languages. Costs associated with the following: <ul style="list-style-type: none"> <li>• School communication platform</li> <li>• Survey platform for parents, teachers, and students</li> </ul>		No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$1,135,338	\$110,809

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
39.32%	0.00%	\$0.00	39.32%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For FY 2023-24, YPI-MORCS will implement the following actions on a "schoolwide" basis while ensure these actions are principally directed to and effective for the targeted students groups under the Local Control Funding Formula:

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

MORCS has a detailed plan to increase foster youth, English learners, and low-income student services. The Charter School staff will take on a "triage" approach to screen student need, apply appropriate tiered instruction, monitor student achievement, and revise the application of instructions needed. All students will have access to grade-level instruction and resources (democracy and equity). Based on the analysis of summative and formative assessments, targeted acceleration and intervention will be provided. The focus will be to scale up. Targeted

instruction will be provided to students at their level and address student-specific needs, focusing on skills needed to master grade-level content in language arts, mathematics, and English Language Development. (less is more, depth over coverage). This accelerated instruction will occur during the instructional day and enable a wide range of services from general education teachers, special education teachers, support staff, and administration. A strategic instructional program requires a multi-tiered instructional delivery model responding to each student's individual needs (personalization).

We continue to ensure that all English Learners, foster youth, and low-income with grade-appropriate technology to access online curricular resources. Building upon the lessons learned during the instructional disruption caused by the pandemic, teachers have incorporated Universal Design for Learning (UDL) into their instruction and provide small group support when needed. Our English learner student group has access to daily Designated ELD and integration of SFA for integrated ELD. All certificated and classified worked collectively to meet the needs of English learners, foster youth, and low-income students.

Mental Health and Well-Being of All: Teachers will continue to receive professional development on trauma-teaching along with the tools and resources to move from a learner manager to a Learner Empowered (Active-Citizen).

- Incorporate welcoming/inclusion activities (develop a tone of decency and trust)
- Create learning teams and expectations (student as worker-teacher as coach)
- Use groups to get students talking (SFA the power is in the conversation)
- Set goals together (student agency)
- Core Priorities of Trauma-Informed Distance Learning
- Predictability
- Flexibility
- Connection
- Empowerment

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

All students enrolled at MORCS are identified as being at least one of the identified targeted LCFF student groups. As such, we will use the additional 15% add-on to sustain the focus on equity and inclusion for our students with disabilities, socioeconomically disadvantaged, English learner and foster youth.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		1:25
Staff-to-student ratio of certificated staff providing direct services to students		1:13



## 2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$2,789,996.00	\$195,068.00		\$555,837.00	\$3,540,901.00	\$2,997,162.00	\$543,739.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Facility, Maintenance, Custodial & Security	All	\$212,310.00				\$212,310.00
1	1.2	Administration	English Learners Foster Youth Low Income	\$677,082.00	\$146,868.00		\$159,118.00	\$983,068.00
1	1.3	Credentialed Classroom Teachers	All	\$1,367,211.00				\$1,367,211.00
1	1.4	Paraprofessionals	English Learners Low Income				\$180,699.00	\$180,699.00
1	1.5	Professional Development	English Learners Foster Youth Low Income	\$295,930.00			\$29,299.00	\$325,229.00
1	1.6	Core Instructional Materials & Licenses	English Learners Foster Youth Low Income	\$72,825.00				\$72,825.00
1	1.7	Technology	English Learners Foster Youth Low Income	\$114,638.00			\$117,000.00	\$231,638.00
1	1.8	Local Assessments	English Learners Foster Youth Low Income					
2	2.1	SFA Instructional Strategies for Skill Acceleration	English Learners					
3	3.1	Acceleration & Study Hall	All					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
3	3.2	Supplemental Curricula	English Learners Foster Youth Low Income					
4	4.1	Integrated and Designated ELD	English Learners				\$69,721.00	\$69,721.00
4	4.2	Acceleration & Study Hall	All					
4	4.3	Expanded Learning Opportunities Summer Learning & Enrichment	English Learners Foster Youth Low Income					
5	5.1	Student Activities & Incentives	All		\$48,200.00			\$48,200.00
5	5.2	Enrollment and Outreach- Schola	All	\$50,000.00				\$50,000.00
5	5.3	Parent/ Guardian Engagement	English Learners Foster Youth Low Income					
5	5.4	Home/School Communications & Feedback	All					

## 2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$2,887,138	\$1,135,338	39.32%	0.00%	39.32%	\$1,160,475.00	0.00%	40.19 %	<b>Total:</b>	\$1,160,475.00
								<b>LEA-wide Total:</b>	\$0.00
								<b>Limited Total:</b>	\$114,638.00
								<b>Schoolwide Total:</b>	\$1,045,837.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Administration	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: MORCS	\$677,082.00	
1	1.4	Paraprofessionals	Yes	Limited to Unduplicated Student Group(s)	English Learners Low Income	Specific Schools: MORCS		
1	1.5	Professional Development	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: MORCS	\$295,930.00	
1	1.6	Core Instructional Materials & Licenses	Yes	Schoolwide	English Learners Foster Youth Low Income		\$72,825.00	
1	1.7	Technology	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income		\$114,638.00	
1	1.8	Local Assessments	Yes	Schoolwide	English Learners Foster Youth Low Income			

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	2.1	SFA Instructional Strategies for Skill Acceleration	Yes	Limited to Unduplicated Student Group(s)	English Learners			
3	3.2	Supplemental Curricula	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income			
4	4.1	Integrated and Designated ELD	Yes	Limited to Unduplicated Student Group(s)	English Learners	Specific Schools: Monseñor Oscar Romero Charter		
4	4.3	Expanded Learning Opportunities Summer Learning & Enrichment	Yes	Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income			
5	5.3	Parent/ Guardian Engagement	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: MORCS		

## 2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$4,291,174.00	\$3,872,943.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Support to increase student academic achievement	Yes	\$446,008.00	\$462,276
1	1.2	Teacher Retention: Coaching Support	Yes	\$200,747.00	\$132,067
2	2.1	Parent Coordinator	Yes	\$71,387.00	\$71,387
2	2.2	Program Coordinator & School Culture Climate Team	Yes	\$342,301.00	\$441,656
2	2.3	Student Activities	Yes	\$25,000.00	\$48,200
2	2.4	Enrollment and Outreach- Schola	No	\$18,000.00	\$18,000
3	3.1	Salaries and Benefits	No	\$2,376,241.00	\$1,904,590
3	3.2	Professional Development	Yes	\$51,160.00	\$50,214
3	3.3	Core Instructional Materials; Technology & iReady assessments	No	\$258,672.00	\$258,672.00
3	3.4	Maintenance/Custodial/Security	No	\$421,719.00	\$429,088

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	3.5	Technology Enhancement	No	\$79,939.00	\$56,793
4	4.2	ELO Summer Learning or Summer Enrichment			

### 2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$941,457	\$937,912.00	\$1,016,468.00	(\$78,556.00)	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Support to increase student academic achievement	Yes	\$446,008.00	\$462,276		
1	1.2	Teacher Retention: Coaching Support	Yes	\$200,747.00	\$132,067		
2	2.1	Parent Coordinator	Yes	\$71,387.00	\$71,387.00		
2	2.2	Program Coordinator & School Culture Climate Team	Yes	\$174,770.00	\$282,538		
2	2.3	Student Activities	Yes	\$25,000.00	\$48,200		
3	3.2	Professional Development	Yes	\$20,000.00	\$20,000		

### 2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$2,299,190	\$941,457	0	40.95%	\$1,016,468.00	0.00%	44.21%	\$0.00	0.00%



# Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

# Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
  - Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

## Plan Summary

### Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

## Requirements and Instructions

**General Information** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

**Reflections: Successes** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

**Reflections: Identified Need** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

**LCAP Highlights** – Identify and briefly summarize the key features of this year's LCAP.

**Comprehensive Support and Improvement** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## Engaging Educational Partners

## Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC Section 52064[e][1]*). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

## Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

### **Local Control and Accountability Plan:**

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1:** “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

**Prompt 2:** “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

**Prompt 3:** “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.



**Focus Goal(s)**

**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

**Broad Goal**

**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

**Maintenance of Progress Goal**

**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal:** Explain how the actions will sustain the progress exemplified by the related metrics.

**Required Goals**

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

### Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.



Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2022–23</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

**Actions:** Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

**Actions for English Learners:** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

### Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants:*** Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

**Projected Additional LCFF Concentration Grant (15 percent):** Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

**Projected Percentage to Increase or Improve Services for the Coming School Year:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

**LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar:** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year:** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

### **Required Descriptions:**

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools:** Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## For School Districts Only:

### Actions Provided on an LEA-Wide Basis:

**Unduplicated Percentage > 55 percent:** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

**Unduplicated Percentage < 55 percent:** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:



An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

## Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —



Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
  - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
  - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
  - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
  - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
  - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
  - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
  - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

### **LCFF Carryover Table**

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
  - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
January 2022

## LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Bert Corona Charter High School

CDS Code: 19647330132126

School Year: 2023-24

LEA contact information:

Yvette King Berg

Executive Director

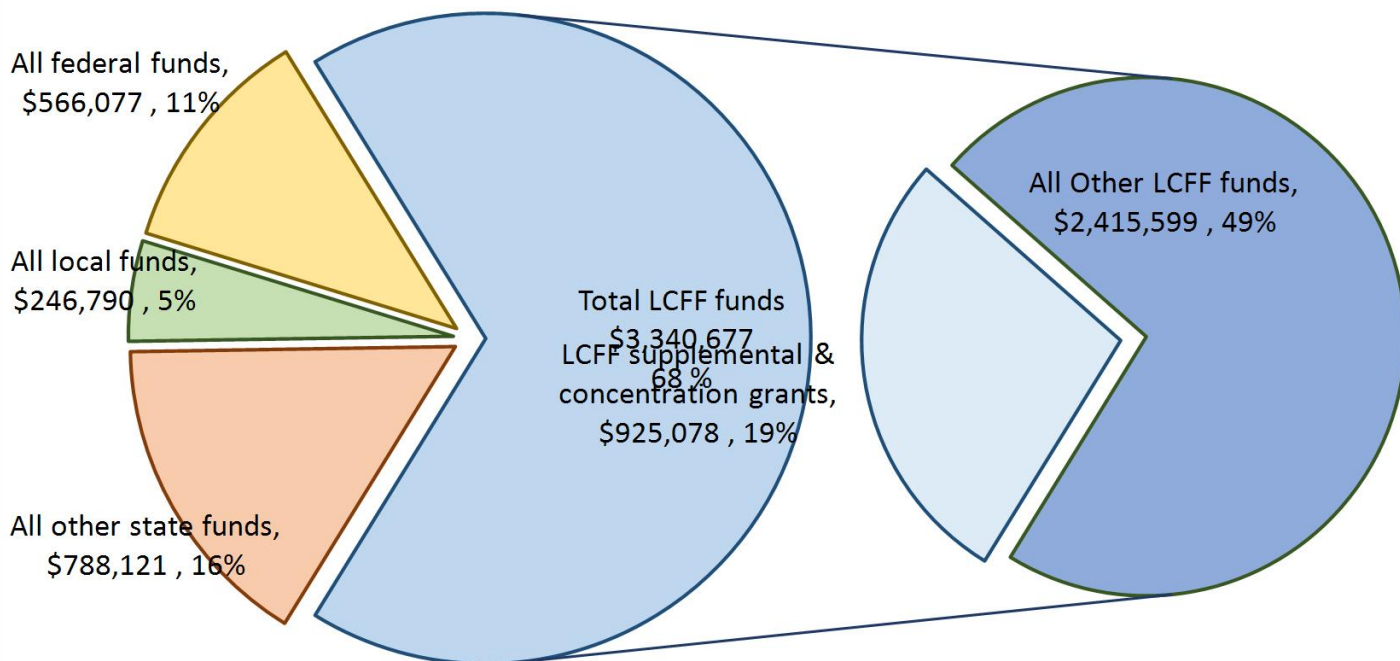
ykingberg@ypics.org

(818) 305-2791

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

### Budget Overview for the 2023-24 School Year

#### Projected Revenue by Fund Source



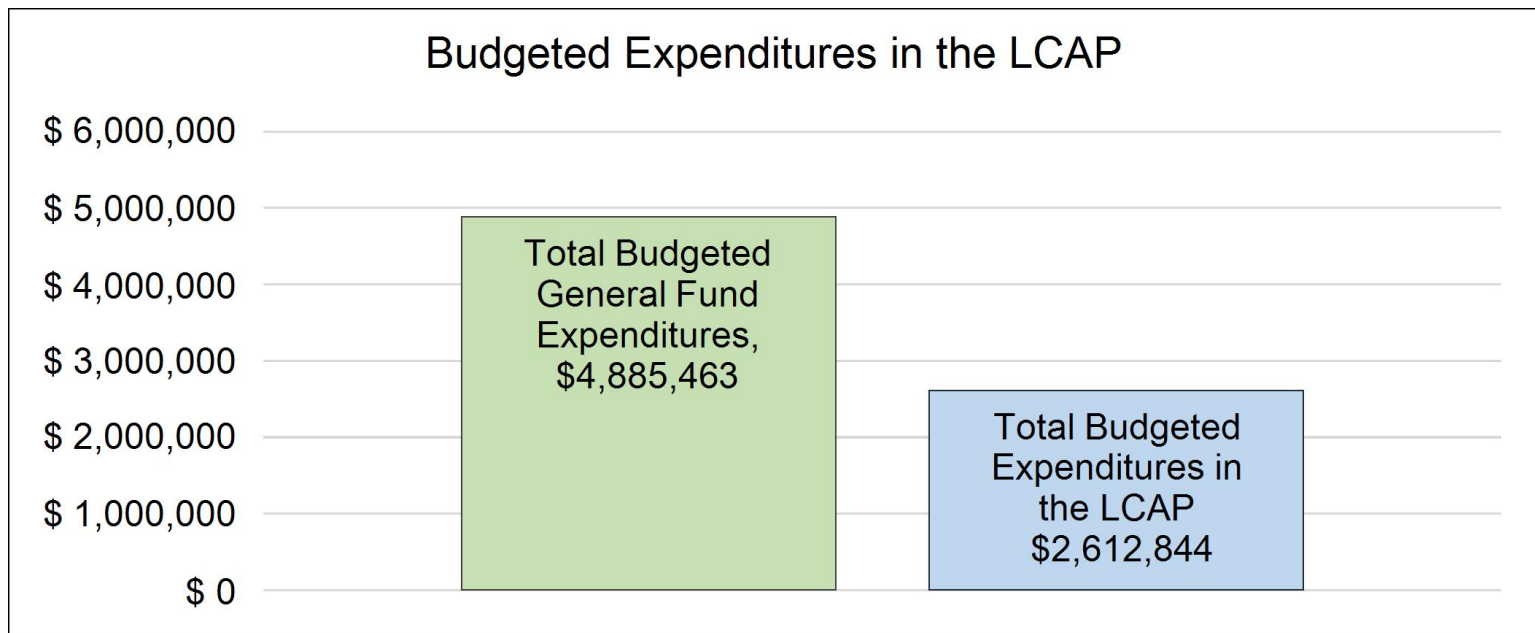
This chart shows the total general purpose revenue Bert Corona Charter High School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Bert Corona Charter High School is \$4,941,665, of which \$3340677 is Local Control Funding Formula (LCFF), \$788121 is other state funds, \$246790 is local funds, and \$566077 is federal funds. Of the \$3340677 in LCFF Funds, \$925078 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).



## LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Bert Corona Charter High School plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Bert Corona Charter High School plans to spend \$4885463 for the 2023-24 school year. Of that amount, \$2612844 is tied to actions/services in the LCAP and \$2,272,619 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

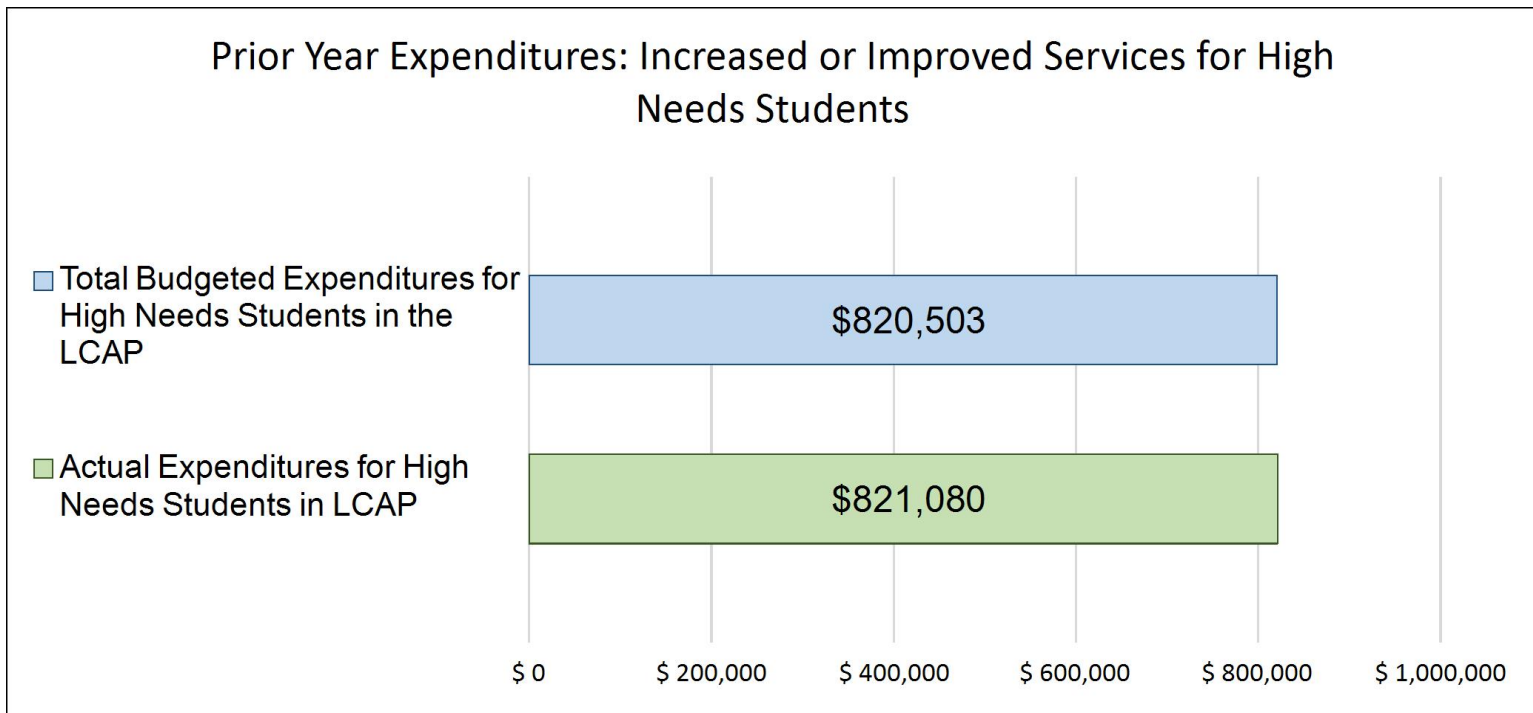
Funds not included in the LCAP consist of Child Nutrition, Special Education, Entitlement/Encroachment, Services & Other Operating Expenses, and Depreciation Expenses.

### Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Bert Corona Charter High School is projecting it will receive \$925078 based on the enrollment of foster youth, English learner, and low-income students. Bert Corona Charter High School must describe how it intends to increase or improve services for high needs students in the LCAP. Bert Corona Charter High School plans to spend \$927617 towards meeting this requirement, as described in the LCAP.

## LCFF Budget Overview for Parents

### Update on Increased or Improved Services for High Needs Students in 2022-23



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

The text description of the above chart is as follows: In 2022-23, Bert Corona Charter High School's LCAP budgeted \$820503 for planned actions to increase or improve services for high needs students. Bert Corona Charter High School actually spent \$821080 for actions to increase or improve services for high needs students in 2022-23.

# Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Bert Corona Charter High School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Plan Summary [2023-24]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Bert Corona Charter High School (BCCH and/or BCCHS) a Youth Policy Institute Charter School (YPICS), serves 200 students in the San Fernando Valley area of Los Angeles County. Represented with 96% Latino, 1% African American, 1.5% Filipino, 1.5% White, 0.5% Foster Youth, 21% English Learners, 24% Students with Disabilities, and 93% Socioeconomically Disadvantaged. (Source: CDE DataQuest, Enrollment Report 2022-23)

**VISION:** Our school is named in honor of and inspired by Bert Corona, a prominent Latino community organizer who dedicated his life to lead the struggle of poor immigrant communities in California and across the nation for social and economic justice.

**MISSION:** The Bert Corona Charter High School early college program prepares urban students in grades 9-12 for academic success and active community participation. The school is located in the San Fernando Valley of Los Angeles, California, an area fraught with poverty and academically struggling students. The majority of students attending schools in this area come from predominantly Latino immigrant families where Spanish is spoken in the home. Many area public school students are eligible for federal free or reduced meals, indicative of the high poverty levels in the area. Bert Corona Charter School seeks to close the achievement gap for these students by providing clear and high expectations for all students to achieve a personalized and supportive learning environment that recognizes students' accomplishments, family-school-community partnerships and service, and integrated technology in the classroom.

The Charter School also serves a wide range of scholars requiring a rigorous program that includes acceleration, differentiated instruction, depth, and complexity. The Charter School is a data-driven school that uses assessment data to understand and improve scholar and school performance. The assessment data (diagnostic, formative, and summative) helps the Charter School continuously plan, monitor, and improve academic programs. Staff reviews the previous spring's state testing results to evaluate the school's academic program and chart a course for the new year based on the students' needs. Subgroups in need of intervention are identified and monitored. In addition to state testing, other assessments include publisher assessments, student work samples, and i-Ready Diagnostic assessments.

Assessments are used to: Identify scholars and subgroups who need additional instruction or intervention; Prescribe a re-teaching or acceleration focus for individual scholars; Identify professional development needs and target school resources.

The Charter School's educators believe it is essential to take a multidimensional approach to meet the needs of its diverse population. The Charter School addresses the social and emotional needs of all students. Teachers analyze data to determine each student's unique talents and needs. Students who are on grade level and approaching proficiency are targeted in the critical instructional areas that propel them to advance in all areas. Students struggling with basic skills are provided grade-level instructional materials and targeted for support by various education experts, Education Specialists, school psychologists, speech pathologists, classroom teachers, and administrators.

The Charter School created its own culture of awareness with considerate, committed, and conscientious teachers serving the needs of our scholars. Many visitors, including the LAUSD Charter Schools Division Executive Director and staff, The US Department of Education, and WASC visiting committee have recognized the positive culture at the Charter School.

## Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Local Indicators: As reported to the Board of Directors, BCCHS met all five local indicators for 2022.

- Graduation Rate Indicator “Very High” 97.2% graduated
- Suspension Rate Indicator ( “Medium” 5.1% suspended at least one day): “High” student groups included English Learners (6.7%) and Students with Disabilities (7.5%). “Medium” student groups were Hispanic (5.2%) and Socioeconomically Disadvantaged (5.7%)

As we opened the 2022-23 academic year, we have conducted PBIS assessment inventories to focus more strategically on needs to improve school culture which impacts student connectedness which in turn decreases suspensions, expulsions, and chronic absenteeism. Based on the most recent available local data, Bert Corona Charter High School had a total of 12 suspensions. In the 22-23 school year, BCCHS has had four suspensions, none of these students were students with disabilities.

BCCHS will/has taken the following steps to decrease the schools suspension rate: Improved MTSS process to provide support and services to students and families with tier II/III needs; increased social emotional and mental health services; and effectively applied the PBIS framework to select programs and strategies to effectively provide alternatives to suspension

As part of our multi tiered system of support, BCCHS has focused on increasing social emotional and mental health services for students and families with Tier II/III needs.

- BCCHS is working with Luminarias Institute Inc. to support students to address social emotional and mental health needs. Luminarias is a community based mental health organization which has special focus on Latino mental health. Luminarias counseling and support services are provided on campus.
- BCCHS has partnered with the Multicultural Learning Center on the Mental Health Service Professional Grant which will be implemented in the 23-34 school year. As a result of this partnership, BCCHS will have a MSW/MFT and MSW/MFT intern based on campus who will provide therapeutic services to our students. Clinical supervision of the staff will be provided by a licensed clinical supervisor who is employed by the Multicultural Learning Center.

Bert Corona Charter High School will continue to use a PBIS framework to develop and select programs and strategies to support students. This year, staff is using Ripple Effects to explicitly teach replacement behaviors to students when they display undesired behaviors. Ripple Effects is a digital suite of programs to personalize social emotional skill building and promote positive behavioral and mental health.

## Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

- English Learner Progress Indicator (“Low” 47.4% making progress towards English language proficiency)

A Reading Specialist has been hired to assist teachers and students in English Language Development. BCCHS has hired this Reading Specialist to support our students who are reading below middle school Lexile norms. She uses data-driven instruction and implements interventions that correlate with the individual student's needs to meet their reading goals. Using Achieve 3000 data as well as data from our MAPs periodic assessments, the most struggling readers in 9th, 10th, and 11th grade have been identified and placed in small groups that are created by their specific targeted intervention. These students are scheduled for intensive reading intervention for a minimum of 80 minutes per week. Our Reading Specialist has determined that some students have significant gaps in their reading skills, but that these gaps are quickly remediated for students who successfully learned how to read in English in earlier grade levels. She identifies the gaps or misconceptions as students read aloud, and in a safe, shame-free environment, where they are corrected and reading is strengthened. For other students, a lack of fluency is almost exclusively the result of insufficient time spent reading and acquiring new vocabulary. The 40 focused minutes for reading and vocabulary acquisition discussions, twice a week, are having an immediate impact on Lexile performance. Our Reading Specialist is helping students become more confident in their reading abilities and allowing them to have a positive experience with reading while getting them excited about it.

- English Language Arts Indicator (“Low” -20 points below standard for the school) We are attempting to resolve the mystery around our SBAC ELA data as 59% of the grade 11 students “met/exceeded” standards (Source: CDE CAASPP 2022).
- Mathematics Indicator (“Very Low” -128.2 points below standard for the school) In 2022, the significant student groups below standard were Socioeconomically Disadvantaged -131.8 DFS; Hispanic -131.4 DFS. This school year at the start of the current semester we set up specific support in the area of math targeting grade levels. 9th Graders engage 80 minutes weekly in Secondary

Foundational Math Skills using Dr. Randy Palisoc's IronBox Core Advantage curriculum during their Algebra 1 blocks. A group of 10th graders was invited to join an after-school math tutoring session to engage in the same curriculum though attendance currently varies meaning we will revisit a plan for the future that includes more of our 10th graders.

## LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

The prior year's LCAP contained three goals:

Goal 1: Increase Student Achievement

Goal 2: Increase meaningful and purposeful student, teacher, and parent engagement.

Goal 3: Provide an appropriate Basic Condition of Learning Social-emotional and behavioral support with extended classes and enrichment activities for students, and ensure all students are actively engaged and supported through a safe, healthy, and rigorous learning environment. Increase student engagement.

Based on analysis of the 2022 CA Dashboard and consultation with our educational partners, it was determined that the 2023-24 LCAP should be expanded to five goals:

Goal 1 Conditions of Learning

Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff.

(State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)

Goal 2 Annual Growth & Achievement in English Language Arts

Increase student achievement in English/Language Arts - Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth. (State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)

Goal 3 Annual Growth & Achievement in Mathematics & Science

Increase student achievement in Mathematics and Science - Maintain high standards for our community to engage students in high levels of achievement in mathematics through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.

(State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)

Goal 4 Growth & Achievement for English Learners and At-Promise Students

Annual growth for English Learners and special student groups - Ensure English learner students are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science.

(State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)

### Goal 5 School Culture & Climate

Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes.

(State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)

Additionally, to provide increased transparency and alignment to the LCFF State Priorities, several metrics have been added.

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Bert Corona Charter High School was not identified for CSI by the CDE

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not applicable.

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not applicable.



# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

The BCCHS Team, including the Executive Director, the Board of Trustees, the Leadership Team, teachers, parents, and students, all contributed to the influence, integration, and specific support to engage all stakeholders in the LCAP development. The Charter School's team also communicated with parents electronically and mailed information home. In the process of daily calls, the Charter School also updated parent emails or cell phones to ensure that the most updated parent contact information was available for mass communication through Both Remind and OneCall.

The staff communicated using Google Meets and Slack. BCCHS regularly holds School Advisory Council meetings, Academic Advisory Committee, and Coffee with the Principal. Elements of the LCAP are discussed often, as well as the use of funds from Title 1, Title II, Title III, and another federal funding budget at our meetings. BCCHS's School Advisory Council and English Learner Advisory Council have been combined to allow for a consistent membership and meeting schedule for this group to focus on the data/progress of our English learners, socioeconomically disadvantaged, and students with disabilities.

The impact of these consultations provided an opportunity for all stakeholders to become involved and contribute to Bert Corona Charter HS' successes.

The involvement of all stakeholders has been a tiered process that provides the opportunity for all teachers, administrators, Board Members, parents, community members, and others to closely review data and discuss the school's priorities as it related to all facets of an educational process. The Bert Corona Charter HS will review all internal data on an ongoing basis, benchmarks, i-Ready/NWEA, SFA, Achieve 3000, Illuminate assessments and other internally created documents and processes, Teachers assessments, grades, and also the English Language Arts/Literacy and Mathematics Summative Assessments.

Additionally:

Small focus groups were held with school leaders, parents, teachers, and students throughout the year to collect comments/advice about the LCAP process and implementation.

All feedback was collected, synthesized, and organized to inform draft LCAP.

Data that will be reviewed include but are not limited to the following:

- School Accountability Report Cards

- English Learner Reports (Annual Measurable Achievement Objectives 1 and 2 and Reclassification Rates) (Suspended due to transition from CDE)

- Course Grades

- Attendance Reports

- i-Ready/NWEA, SFA, Achieve3000, and other assessment results.

The primary parent organization accessible for parent participation in the BCCHS School Advisory Council. This council discusses the school's academic, operational, and cultural initiatives and votes to adopt/approve significant school program changes. In addition, monthly



parent information and dialogue meetings are held on the fourth Tuesday of the Month, all parents are scheduled for conferences with staff each semester, parents coach sports and attend athletic events, and the school's Advisory Program invites parents to bring their expertise and resources to support students in their campus-wide projects.

In 2022 the school was awarded a California Community Schools Partnership Program Planning Grant. Total funding of \$200,000 supported with hiring a Coordinator of Community Schools (CoCS), contract services for data analyses, teachers/staff stipends, parent capacity development, and teacher/staff professional development.

School Community engagement kicked off in August 2022 with an overview of the CA community school framework and the YPICS vision for its community school to teachers and staff during the beginning of the school year professional development days. Followed by parent-teacher conferences, workshops, SAC/ELAC meetings, Café con Los Directors, and community events during the months of September - December 2022. During parent-teacher conferences. CoCS introduced the community school framework and the LCAP to parents and an overview of the assets and needs assessment work ahead. In October and November, families were engaged via annual events like Trunk-or-Treat, Día De Los Muertos, and College & Career Parent workshops.

To understand the needs and gaps the evaluation team conducted sensemaking sessions with the community to better understand the experiences of youth, administrators, teachers, and families. The evaluation team analyzed all the data collected from October 2022 to January 2023 and shared it with the community. The purpose was to ask about their reactions and experiences with the data. In addition, to pose back to the community the needs shared in all the data and have them select their top three interests in school investments. The intended purpose of hosting sensemaking meetings was to share the data collected from the community and collectively analyze it as a team and to inform the LCAP and the implementation plan for the school. Upon completion of all assessment activities, priority topic areas were identified for the school and will be the areas to focus on by aligning resources, strategies, and partnerships.

#### A summary of the feedback provided by specific educational partners.

To address the needs of our community school, the school undertook a comprehensive community school planning process that included asset mapping (reviewing of the LCAP), a needs assessment and gap analysis, and a heavy emphasis on engagement with and leadership by the school community, including students, families, staff, teachers, administrators, partners, and area residents.

Community School and LCAP needs assessment activities occurred throughout the year. These included YouthTruth Survey and Focus Groups with stakeholders. In-person focus groups were conducted with students, teachers, and families at each school across grade levels and positions (instructional and supportive staff) SAC/ELAC members to gain a more holistic understanding of the strengths and challenges of our school. Key Informational Interviews with staff and teachers and in-person interviews were conducted with school administrators and teachers to assess successes and challenges with the school culture and the range of services offered at the school. Focus groups explored topics like what makes them feel welcome/unwelcome on campus, what makes them feel successful as learners and teachers in their vision for a "community school," if they feel engaged in decision-making, how the school can build more trusting relationships, and what support services are needed.

All assessment activities examine needs and gaps in services and school and community assets and resources that can be integrated as part of our community school. The input of stakeholders has been instrumental in developing our school's LCAP and the Community Schools Implementation Plan.

In April and May the LCAP was drafted and ready for input from University and LAUSD Partners (LMU, UCLA, and Charter Operated Programs Options Staff) LMU reviewed the plan specifically for EL Actions and ensured that the school has a way to manage a comprehensive EL Master plan aligned the CA Roadmap for ELs. UCLA reviewed Social-emotional support for students' counseling services, and Charter Operated Programs reviewed actions for students with disabilities (tiered and tutoring supports).

The YPICS Board held a public hearing/update for input from both the board and the public on June 5, 2023.

#### A description of the aspects of the LCAP that were influenced by specific input from educational partners.

The following are aspects of the LCAP that stakeholders influenced.

##### Focus on Essential Standards (Learning Outcomes/Indicators)

- Identify/revise essential standards for each grade/course;
- Ensure all students have access to grade-level Essential Standards and materials;
- Identify students who need additional support to accelerate learning and to mitigate pupil learning loss;
- Schedule time for students experiencing pupil learning loss.

All feedback collected throughout the above process resulted in the LCAP actions which are aligned with the YPICS vision to improve Cornerstone Commitments of Community Schools: A commitment to assets-driven and strength-based practices for all stakeholders; A commitment to racially just and restorative school climates; A commitment to powerful, culturally proficient, and relevant instruction; and a commitment to shared decision-making and participatory practices to improve student achievement and outcomes.

# Goals and Actions

## Goal

Goal #	Description
1	<p>Goal 1. Conditions of Learning</p> <p>Maintain high standards for a safe, nurturing, engaging learning environment where ALL students are supported in attaining high levels of achievement through the use of high-quality curricula and exceptional staff.</p> <p>(State Priorities: 1 Basic Services, 2 Implementation of State Standards, 7 Course Access)</p>

An explanation of why the LEA has developed this goal.

While the prior LCAP contained a goal similar to this new goal, it was all encompassing and left members of the community overwhelmed with the combination of academic progress data AND basic conditions of learning. The new goal was created for the 2023-24 LCAP to allow for a separation of these two areas.

As discussed in the Educational Partner Engagement section, the implementation of the community-wide Data Walks, we want to ensure there is a clear understanding of the basic enabling conditions that are necessary to be in place for students to experience not only continued academic growth, but also safety and an environment which nurtures/supports their social emotional needs as well.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization; all teachers will be appropriately assigned	100% All classroom teachers hold a valid CA Teaching Credential as defined by the CA Commission on Teaching Credentialing and have appropriate EL authorization. All teachers were	83.3% Clear (Source: CDE DataQuest, 2020-21 Teaching Assignment Monitoring Outcomes by Full-Time Equivalent 2020-21)  [NOTE: Originally reported as “100% of classroom teachers will hold a valid CA	TBD - 2021-22 Teaching Assignment Monitoring Outcomes		All classroom teachers will hold a valid CA Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization; all teachers will be appropriately assigned.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Priority 1 Basic Services	appropriately assigned.	Teaching Credential as defined by the CA Commission on Teacher Credentialing and appropriate EL-authorization. All teachers appropriately assigned.”]			
Access to standards-aligned curricular and instructional materials	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)	100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)		100% of teachers/students with access to standards-aligned curricula (ELA, 100% of teachers/students with access to standards-aligned curricula (ELA, ELD, math, science, social science, and social science)
Implementation and sustainability of academic content standards, as measured by the Local Indicator Rubric on the California Accountability Dashboard Priority 2 Implementation of	Same as Year 2 Outcome	N/A	Implementation of State Standards 2023 ELA 5 ELD 5 Math 5 NGSS 5 History 5 CTE 5 Health Ed. 5 Phys. Ed. 5		Implementation of State Standards  ELA 5 ELD 5 Math 5 NGSS 5 History 5 CTE 5 Health Ed. 5 Phys. Ed. 5

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
adopted State Standards			VAPA 5 World Language 5 (Source: As reported in the Local Indicators 2023 Self-Reflection Tool)		VAPA 5 World Language 5
Teachers will participate in ongoing research-based professional development in the areas of English Language Arts, Math, Next Generation Science Standards (NGSS), English Language Development (ELD), Technology, and Differentiated instruction to meet the needs of all students and subgroups. Priority 2 Implementation of adopted State Standards	96% Teachers participated in professional development throughout the physical closure of the Charter School.	96% of teacher participated in professional development during 21-22	100% of teacher participated in professional development as it pertains to their content area/field during 22-23		100% of teachers participating in professional development
Student Access to a Broad Course of Study Priority 7 Course Access	100% of students have access to a broad course of study	100% of students have access to a broad course of study	100% of students have access to a broad course of study		100% of students have access to a broad course of study

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		CA Dashboard Local Indicator “Met” (Source: CDE, CA School Dashboard 2022)	CA Dashboard Local Indicator “Met” (Source: As reported in the Local Indicators 2023 Self-Reflection Tool)		
School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists with > 90% of items in compliance or good standing. Priority 1 Basic Services	100% The Charter School developed a cleaning regiment based on best practices for reopening schools from the California Department of Public Health (6/5/2020) and the California Department of Education (6/8/2020)	100% of facilities clean and maintained in good repair	Overall Facility Rating as measured by FIT “Good” (Source: As reported in the SARC, February 2023)		School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists with > 90% of items in compliance or good standing

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Facility, Custodial, Safety & Security	BCCHS operates on a co-located Prop 39 site under an agreement with LAUSD. The costs for this action include the annual cost of operation under the MOU for the use of Maclay facilities and janitorial services. Supervision Aide conducts regular walkthroughs and monitors pupil/staff safety. School facilities are clean and maintained in good repair with daily spot check and Site Inspection Lists with > 90% of items in compliance or good standing.	\$220,000.00	No

Action #	Title	Description	Total Funds	Contributing
1.2	Administration	Costs associated with the salaries and benefits for administrative staff positions include: Executive Administrator, Operations Coordinator, Parent Coordinator, Community Schools Coordinator, and School Climate & Culture Coordinator. The School Climate & Culture Team will continue quality implementation of the PBIS Framework and programs.	\$524,685.00	Yes
1.3	Credentialed Teachers	Costs associated with hiring/maintaining the following highly effective credentialed staff (salaries & benefits): Credentialed Classroom Teachers Lead Teacher stipends Administrators and Teacher leads will conduct regular instructional walkthroughs/observations to align to the expectations for impactful instruction. Observations will be followed by coaching/feedback and mentoring as needed.	\$1,054,534.00	No
1.4	Paraprofessionals	Costs associated with full-time paraprofessionals for Special Education and instructional aides for general education. Behavior Intervention Implementation Assistants assigned to work with special education students 1:1 as required by the IEPs	\$180,421.00	No
1.5	Professional Development	Professional Development for all staff members (Pre-service & On-going) topics include, but are not limited to:  RE/LAY Graduate School of Education - Continue training for leaders and teachers to sustain the school vision for high-impact instruction and provide a common framework for coaching, observation and feedback. This allows for a common language and understanding of instructional expectations that are rooted in equity for all students.  BTSA Training/ New Teacher Support (Title 2)	\$226,654.00	Yes

Action #	Title	Description	Total Funds	Contributing
		<ul style="list-style-type: none"> <li>• Backwards Design</li> <li>• Standards-Based Grading</li> <li>• Project-Based Learning</li> <li>• Service-Learning</li> </ul> <p>Equity-focused Standards-based Instruction</p> <ul style="list-style-type: none"> <li>• Building Positive Relationships (teacher-student; teacher-family; school-home) and sustaining an inclusive culture based on respectful communication</li> <li>• ELD strategies for English Learners to access grade-level core curriculum/impact academic growth</li> <li>• CCSS and core standards in ELA, ELD, mathematics, Next Gen Science Standards (NGSS), and social sciences</li> <li>• Instructional shifts for maintaining rigorous instruction (lesson design, "big ideas", essential questions, academic discourse, close reading, text-dependent questions, etc.)</li> <li>• Curricular-specific trainings (for core and use of iReady, Infinite Campus, Thinking Nation, writing assessments)</li> <li>• Engaging and empowering students through deeper instruction</li> <li>• Use of data warehouse Innovare to integrate multiple data sources to guide teacher/administration student-centered educational decisions</li> </ul> <p>Supporting the Growth of English Learners &amp; Dually-Identified Students</p> <ul style="list-style-type: none"> <li>• Quality implementation of the English Learner Master Plan aligned to the CA English Learner Roadmap</li> <li>• Implementation of strategies to support EL acquisition/mastery of the English language (speaking, listening, reading, writing)</li> <li>• Understanding the language needs of ELD in acquisition of academic language</li> <li>• Strategies for supporting Students with Disabilities in the general education classroom</li> <li>• Training and use of Success For All instructional strategies to ensure students receive support in the development of</li> </ul>		



Action #	Title	Description	Total Funds	Contributing
		<p>foundational skills that posed barriers to accessing grade-level standards-based instructional content</p> <p>Multi-tiered System of Support</p> <ul style="list-style-type: none"> <li>• Use of internal data sources to drive decisions/recommendations for academic acceleration and progress monitoring</li> <li>• Positive Behavior and Intensive Support (PBIS) and alternatives to suspension</li> </ul>		
<b>1.6</b>	Core Instructional Materials & Licenses	Costs associated with the on-going use of: iReady ELA and Mathematics textbooks, eTextbooks for NGSS (annual licenses), History Alive (student licenses for eTexts), Thinking Nation platform for access to primary source documents, Google Classroom Suite, NearPod, Explore Learning for Science, iXL for math, visual/media arts Adobe Suite	\$79,472.00	Yes
<b>1.7</b>	Technology	Technology provided to all students. Based on the Technology Plan developed for cycling out/replenishing student devices.	\$88,821.00	Yes
<b>1.8</b>	Local Assessments	Students will be assessed 3xs per year using the state-verified NWEA MAP suite in ELA and math. This data will be used by all teachers to gauge the needed additional supports needed in order to accelerate the acquisition of foundational skills which are necessary for accessing grade-level content.		No
<b>1.10</b>				

Action #	Title	Description	Total Funds	Contributing

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
2	<p>Goal 2. Annual Growth &amp; Achievement in English Language Arts</p> <p>Maintain high standards for our community to engage students in high levels of achievement in English/Language Arts through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.</p> <p>(State Priorities: 4 Pupil Achievement, 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-BCCHS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the ELA-specific goal for increased transparency for all.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
<p>Increase student achievement in English/Language Arts as measured by the SBAC</p> <p>[NOTE: The original metric in 22-23 was “English Language Arts – Proficiency”] Priority 4 Pupil Achievement Involvement</p>	<p>SBAC ELA 2019 %Met &amp; Exceeded</p> <p>38% All students 38.7% Latino 41.8% SED</p> <p>(Source: CA School Dashboard 2019)</p>	<p>N/A</p> <p>CA Dashboard 2021 – Not published due to COVID</p>	<p>SBAC ELA 2022 %Met &amp; Exceeded</p> <p>53% All students (-20 DFS) 38.7% Latino (-22.2 DFS) 41.8% SED (-22.6 DFS)</p> <p>(Source: CA School Dashboard 2019)</p>		<p>Annually increase students meeting/exceeding standards</p>

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase the percentage of students demonstrating growth on Local ELA Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	NWEA 2022-23 Growth 39% At/Above Grade-level 53% Students demonstrating growth BOY to EOY		Annually increase percentage of students demonstrating growth in NWEA reading as measured by local assessments

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	ELA Interventions	BCCHS Literacy Specialist works with small groups of students who are reading below middle school Lexile norms. On a pullout basis for 80 minutes per week, students who are performing below grade-level average on NWEA MAP and Achieve3000 Lexile levels in order to increase their fluency, vocabulary development, and Lexile level. (NOTE: Costs for materials; costs associated with salary/benefits are captured in Goal 1)	\$84,122.00	Yes
2.2	ELA Instructional Support Courses	Scheduled instructional block where students are programmed for supports and acceleration in ELA. Applying the training that has been provided, classroom teachers will apply SFA instructional strategies to address foundational literacy needs of students. The primary setting for the use of the strategies during the regular instructional day in order to accelerate the closing skill gaps in ELA, while providing grade-level access to content standards.		Yes

Action #	Title	Description	Total Funds	Contributing
2.3	Junior and Senior Seminars (ELA component)	Junior and Senior Seminar instructional block focused on CAASPP/SBAC practice using materials created by the CDE to support ongoing development of skills for students to familiarize themselves with the language and rigor of state English/language assessments including performance tasks.		No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
3	<p>Goal 3. Annual Growth &amp; Achievement in Mathematics and Science</p> <p>Maintain high standards for our community to engage students in high levels of achievement in mathematics and science through the use of high-quality curricula and local assessments, and ensure the necessary targeted acceleration and supports are delivered in a timely manner to maximize student growth.</p> <p>(State Priorities: Priority 4 Pupil Achievement, Priority 8 Other Pupil Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new "targeted" goal starting with the 2023-24 as we seek to surface content-area specific growth data, and better support our students. YPI-BCCHS seeks to strategically use data to drive instructional decisions, and the implementation of Community Data Walks to engage our families and partners in data led to the creation of the math/science-specific goal for increased transparency for all. Math is an ongoing area for growth as our students continue to face challenges with foundational skills while simultaneously needing to access/excel in grade-level standards.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
<p>Student achievement in Mathematics as measured by the SBAC</p> <p>[NOTE: The original metric in 22-23 was "Mathematics Proficiency"]</p> <p>Priority 4 Pupil Achievement</p>	<p>SBAC Math 2019 %Met/exceeded</p> <p>12.9% All Students 13.1% Latino 13% SED</p> <p>(Source: CA School Dashboard)</p>	<p>N/A</p> <p>CA Dashboard 2021 – Not published due to COVID</p>	<p>SBAC Math 2022 CA Dashboard Indicator "Very Low"</p> <p>%Met/exceeded</p> <p>8% All Students (-128.2 DFS) 6.1% Latino (-131.4 DFS) 8.5% SED (-131.8 DFS)</p>		<p>Annually increase students meeting/exceeding standards</p>

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
			(Source: CA School Dashboard)		
Increase the percentage of students demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	NWEA Math Growth 2022-23 28% At/Above Grade-level 53% Students demonstrating growth BOY to EOY		Annually increase percentage of students demonstrating growth in reading as measured by local assessments  NOTE: Previously reported as “Use of Verifiable Data i-Ready results: Reading 172% of student typical growth All grades 165% to 200% growth 13% of students at grade to 24% Mathematics 122% of student typical growth All grades 28% of students at grade”
Next Generation (Science) as measured by CAST Priority 4 Pupil Achievement	CAST 2019  %Met/exceeded 17% All Students 15% Latino	N/A	CAST 2022  %Met/exceeded 3.7% All Students 3.7% Latino		Annually decrease %age of "Nearly Met"

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	21% SED  %Nearly Met 68% All Students 70% Latino 67% SED  (Source: CDE CAASPP 2019)		4% SED  %Nearly Met 37% All Students 37% Latino 36% SED  (Source: CDE CAASPP 2022)		

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Math Acceleration Courses	Scheduled instructional block where students are programmed for support and acceleration in math. Secondary Foundational Math Skills for 9th Graders (80 minutes/ week) in using Core Advantage curriculum during their Algebra 1 blocks.		No
3.2	Targeted Math Tutoring	Students will be identified based on the NWEA MAP scores and academic course grades to attend tutorial in 10-week blocks for skill improvement. Students may exit when their skills are at grade-level.	\$2,835.00	Yes
3.4	Study Hall/Homework Help	Study Hall: Facilitated by a certificated teacher, study hall is focused on pathway completion and re-do mastery assignments. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]		No



Action #	Title	Description	Total Funds	Contributing
3.5	Junior and Senior Seminars (Math component)	Junior and Senior Seminar instructional block focused on CAASPP/SBAC practice using materials created by the CDE to support ongoing development of skills for students to familiarize themselves with the language and rigor of state math assessments including performance tasks.		No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
4	<p>Goal 4. Annual Growth and Achievement for Special Student Populations                      Annual growth for English Learners &amp; Students with Disabilities                      Ensure English learners and Students with Disabilities are demonstrating annual growth and progress in the mastery of state standards in English, mathematics and science.                      (State Priorities: 4 Pupil Achievement, 8 Other Student Outcomes)</p>

An explanation of why the LEA has developed this goal.

This is a new goal for the 23-24 LCAP to focus on the achievement of our special populations, specifically English learners and Students with Disabilities. Since the majority of our SWD student group are also English Learners and/or socioeconomically disadvantaged, this goal was created to focus on the academic needs of our most vulnerable students as they face the most substantial barriers to achieving grade-level standards mastery.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
English Learner Progress Indicator – ELs making progress towards English language Proficiency (ELPI) Priority 4 Pupil Achievement	28% making progress towards English language proficiency (Source: 2019 CA School Dashboard)	N/A  CA Dashboard 2021 – Not published due to COVID	47.4% making progress towards English language proficiency “Low” (Source: 2022 CA School Dashboard)		Annually increase English learner growth in English proficiency as measured by the CA Dashboard English Learner Progress Indicator (ELPI)
English learner proficiency as measured by ELPAC Priority 4 Pupil Achievement	3.2% Proficient 19.4% Level 3 45.2% Level 2 32.4% Level 1	8.3% Proficient 38.9% Level 3 36.1% Level 2 16.7% Level 1	18% Proficient 38.5% Level 3 28.2% Level 2 15.4% Level 1		Continue to increase the number of English Proficiency as measured by ELPAC

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	(Source: CDE English Language Proficiency for Summative ELPAC 2018-19)	(Source: CDE English Language Proficiency for Summative ELPAC 2020-21)	(Source: CDE English Language Proficiency for Summative ELPAC 2021-22)		
Reclassification Rate of EL to RFEP Priority 4 Pupil Achievement	23.53% Reclassification Rate (Source: Ed-Data, Redesignated Fluent English Proficient 2019-20)	16.22% Reclassification Rate (Source: Ed-Data, Redesignated Fluent English Proficient 2020-21)	TBD - Reclassification Rate for 2021-22 pending		23.5% Reclassification Rate
SWD & English learner student achievement in English/Language Arts as measured by the SBAC Priority 4 Pupil Achievement	SBAC ELA 2019  SWD (-78.7 DFS) 20% Met/exceeded 26.7% Nearly Met 53.3% Not met  EL (-107 DFS) *NOTE* Data suppressed because 10 or fewer students tested, and in order to protect student privacy	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC ELA 2022  SWD (-107.4 DFS) 18.2% Met/exceeded 27.3% Nearly met 54.6% Not met  EL (-124.8 DFS) *NOTE* Data suppressed because 10 or fewer students tested, and in order to protect student privacy		Annually decreasing the percentage of ELs/SWD “Not Meeting” and increase percentage of “Meeting/Exceeding”
Increase the percentage of SWD &/or English learners demonstrating growth on Local ELA Assessment (BOY to EOY)	Same as Year 2 Outcome	N/A	NWEA Reading & Language Growth 2022-23 At/above grade-level 22% ELs 13% SWD		Annually increase percentage of SWD and English learners demonstrating growth in reading as measured by local assessments

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Priority 8 Other Pupil Outcomes			Students demonstrating growth BOY to EOY 54% ELs 50% SWD		
SWD & English learner student achievement in Math as measured by the SBAC Priority 4 Pupil Achievement	SBAC Math 2019  SWD (-158 DFS) 6.7% Met/exceeded 13.3% Nearly Met 80% Not met  EL (-163 DFS) *NOTE* Data suppressed because 10 or fewer students tested, and in order to protect student privacy	N/A  CA Dashboard 2021 – Not published due to COVID	SBAC Math 2022  SWD (-170.3 DFS) 0% Met/exceeded 18.2% Nearly met 81.8% Not met  EL (-203 DFS) *NOTE* Data suppressed because 10 or fewer students tested, and in order to protect student privacy		Annually decreasing the percentage of ELs/SWD “Not Meeting” and increase percentage of “Meeting/Exceeding”
Increase the percentage of English learners demonstrating growth on Local Math Assessment (BOY to EOY) Priority 8 Other Pupil Outcomes	Same as Year 2 Outcome	N/A	NWEA Math Growth 2022-23 At/above grade-level 10% ELs 2% SWD  Students demonstrating growth BOY to EOY 56% ELs 52% SWD		Annually increase percentage of SWD and English learners demonstrating growth in math as measured by local assessments

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	School-wide SFA Tools/Strategies	All BCCHS teachers are trained in SFA instructional strategies to address the literacy needs of English Learners, SWD, and dually identified students (in order to access grade-level standards)		Yes
4.2	Designated ELD - Specialized Reading Support for English Learners/ELD	To address the ongoing literacy needs of our special populations, the Reading Specialist assists teachers and students in English Language Development. Professional development is also provided to teachers on strategies for LTELs. Designated ELD will be provided to ELs in alignment with their level of English development. [NOTE: Costs associated with this action are materials only. Any staffing costs are captured in Goal 1.]		Yes
4.3	Equity for SWD	Students with IEPs receive both push-in (during core) and RSP Lab in order to provide access to the full educational program while meeting the accommodations and services required by the IEP. The RSPs and core teachers regularly collaborate for instructional planning (co-teaching) to ensure SWD are appropriately supported in assessing grade-level content standards.		No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

Goal #	Description
5	<p>Goal 5. Positive School Climate &amp; Culture</p> <p>Engage students, teachers and parents as partners to strengthen the school climate and increase their understanding of the focus to improve successful secondary outcomes.</p> <p>(State Priorities: 3 Parental Involvement, 5 Student Engagement, 6 School Climate)</p>

An explanation of why the LEA has developed this goal.

This goal has been developed starting with the 2023-24 academic year to have a more holistic approach to student/family engagement and its impact on the indicators of satisfaction and connectedness. Specifically, BCCS has witnessed an increase in chronic absenteeism and suspensions since the pandemic. As a community we seek to meaningfully engage the families to foster a deeper understanding of the importance of regular school attendance and its impact on student achievement. We see our efforts are working in the area of on-site safety and positive climate as our suspensions have declined schoolwide. We believe our engagement of parents and fostering positive school-home relationships to be the key to increasing the number of students we have in regular attendance.

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
School efforts to increase Parent involvement through input in decision-making via board meetings, SSC, ELAC, and engagement through workshops/trainings Priority 3 Parental Involvement	Same as Year 2 Outcome	N/A	<p>10 Board Meetings held</p> <p>10 SAC (School Advisory Committee) meetings held</p> <p>Monthly Parent Trainings/ Workshops held (promote college awareness/attendance, financial aid, etc.)</p>		<p>Maintain monthly meetings of the Board of Directors and SAC</p> <p>Maintain monthly Monthly Parent Trainings/ Workshops to promote college awareness/attendance, financial aid, etc.</p>

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Increase parent participation rate on parent survey Priority 3 Parental Involvement	Same as Year 2 Outcome	N/A	61% Parent Participation 77% Input in decision-making 86% Satisfaction		Annually increase and ratings of satisfaction by parents
Increase student participation rate on student survey and positive ratings (School Safety & Connectedness) Priority 5 Student Engagement /Priority 6 School Climate	Same as Year 2 Outcome	N/A	75% Student Participation 55% Belonging 42% Relationships		Annually increase and ratings of satisfaction by students
Increase teacher participation rate on school survey Priority 6 School Climate	Same as Year 2 Outcome	N/A	57% Staff Participation 81% Relationships/ School Culture		Annually increase and ratings of satisfaction by teachers
Decrease Chronic Absenteeism rate Priority 5 Student Engagement	2019 Chronic Absenteeism  21.2% All 21.5% SWD 22.2% EL 20.7% Latino 21.5% SED	2021 Chronic Absenteeism  22.1% All 24.5% SWD 18.4% EL 21.5% Latino 22.4% SED	2022 Chronic Absenteeism  43.3% All 49.1% SWD 44.4% EL 43.7% Latino 42.7% SED		The school will annually decrease and maintain a chronic absenteeism rate below 7%.
Suspension Rate Priority 6 School Climate	2019 Suspension Rate Indicator "Green"	Maintained below 1%	2022 Suspension Rate Indicator "Medium"		The school will decrease and



Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	1.9% All 3% SWD 0% EL 1.9% Latino 1.8% SED		5.1% All 7.5% SWD 6.7% EL 5.2% Latino 5.7% SED		maintain a suspension rate below 6.2%.
Expulsion Rate Priority 6 School Climate	0% Expulsion Rate	Maintained below 1%	0% Expulsion Rate (Source: CDE DataQuest, 2021-22 Expulsion Rate)		The school will continue to maintain an expulsion rate below 1%.
High School Dropout Rates Priority 5 Student Engagement	10.9% Cohort Dropout Rate 2019-20  4.5% Cohort Dropout Rate 2018-19 (Source: Ed-Data, Cohort Dropouts)	5.9% Cohort Dropout Rate 2020-21	0% Cohort Dropout Rate 2021-22 (Source: CDE DataQuest, 2021-22 Four-Year Adjusted Cohort Outcome Report)		Maintain a HS dropout rate <2%
Graduation Rate	96.3% Cohort Graduation Rate 2019-20  93.2% Cohort Graduation Rate 2018-19 (Source: Ed-Data, Cohort Graduates)  NOTE: Originally reported as “N/A - No color assigned for the Graduation Rate	68.6% Cohort Graduation Rate 2020-21 (Source: Ed-Data, Cohort Graduates)  NOTE: Originally reported as “N/A - No color assigned for the Graduation Rate Indicator on the Dashboard. (93.3%)”	97.2% Graduated (Source: CA School Dashboard 2021-22)  96.3% Cohort Graduation Rate 2021-22 (Source: CDE DataQuest, 2021-22 Four-Year Adjusted Cohort Outcome Report)		N/A - No color assigned for the Graduation Rate Indicator on the Dashboard. (93.3%)

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	Indicator on the Dashboard. (93.3%)”				
College/Career Readiness	% AP Exams 3 or better (2018-19) 53.7%	53.7% AP Exams 3 or better (2018-19)	65.4% Graduates meeting A-G coursework requirements (Source: CDE DataQuest, 2021-22 Four-Year Adjusted Cohort Graduation Rate Report)		Annually increase % Graduates meeting A-G coursework requirements  Increase % Students scoring AP Exams 3 or better
Increase Average Daily Attendance Priority 5 Student Engagement	School will continue to maintain ADA rate at or above 94%	School will continue to maintain ADA rate at or above 94% Met modified-Due to COVID-19 Attendance Committee specific vision and goal(s) for outreach (2021-22) and enrollment in 22-23. The team continues to address the issues and have a detailed action plan and/or a marketing strategy calendar.	89% ADA (P-2 Reporting 22-23)		School will continue to maintain ADA rate at or above 94%

## Actions

Action #	Title	Description	Total Funds	Contributing
5.1	Advisory with SEL Component	<p>All students are enrolled in “Advisory” which includes modules on college/career exploration aligned to student interest. Additionally, this course has a SEL component embedded addressing mindfulness, distress tolerance, emotional regulation, and interpersonal effectiveness.</p> <p>[NOTE: Costs for this action are for materials only. Staffing costs are captured in Goal 1.]</p>		No
5.2	Student Activities & Sports Program	<p>Student Activities to engage students in learning and enhance feelings of belonging and connectedness. The school leadership will work with teachers/advisory course leaders to develop a range of activities to promote student engagement and incentivize improvement in metrics identified with school culture/climate including attendance, positive behaviors, academic improvement/growth. The work of the School Climate/Culture Team as well as the Parent Coordinator will align to maximize positive climate and engagement. Team building, school trips (e.g. aligned to educational standards and/or college-going) and cultural events (to underscore our commitment to diversity) will support these efforts in establishing/maintaining a positive school climate. For 23-24 it will be the first year of full CIF membership for 7 sports.</p>	\$15,000.00	No
5.3	Culture of College Readiness	<p>The Coordinator of College/Career readiness provides a range of activities for students and families to understand the pathways to college. Monthly workshop topics will include applying to college, financial aid, test prep and admissions. In partnership with GEAR UP, all grade levels will take part in college visits throughout the year, and juniors/seniors will have extended overnight visits to experience the college setting.</p> <p>While we seek to ensure all students are prepared to enter and succeed in college, the economic realities which surfaced during the pandemic, requires BCCHS to redouble its efforts to engage families on the importance of pursuing a college degree, and the necessary</p>	\$110,700.00	Yes

Action #	Title	Description	Total Funds	Contributing
		preparations for college (e.g. coursework, graduation, college testing, financing, etc.)		
5.4	Dual Enrollment	In partnership with Los Angeles Mission College, students are provided with the opportunity to enroll in a college course per semester/earn college credits.		No
5.5	Credit Recovery	BCCHS uses both in-schedule and Edgenuity to provide opportunities to all students to retake courses for academic credit. These courses may be taken during the summer as well as during the academic year. Costs associated with this action include Edgenuity platform.	\$15,600.00	Yes
5.6	Career/Technical Education	Career Technical Education Visual and Media Arts Program includes Arts, Media and Entertainment, Information and Communication Technologies, and Manufacturing and Product Development pathways.. BCCHS will continue to provide industry-standard technologies in order to equip our graduates with job skills for use in online content production, clothing design, entertainment industry editing, or advertisement (e.g., Adobe Creative Suite training and Mac Media Lab machines). Costs associated with this action include technology, equipment, supplies, and media software.	\$8,000.00	No
5.7	Parent/Guardian Engagement	The Coordinator of Operations will assist with planning and implementation of the annual activities for meaningfully engaging parents/guardians to support the success of their child at BCCHS. At minimum, these activities include meetings of the School Advisory Council, English Learner Advisory Committee, back to school night, parent conferences, IEP meetings.	\$1,000.00	No

Action #	Title	Description	Total Funds	Contributing
5.8	Positive Behavioral Interventions & Supports	In the return to in person instruction, and reflecting on data from the 2021-22 academic year, BCCHS has implemented PBIS to assist (and incentivize) students to exhibit behaviors consistent with a positive climate/culture. The school will continue to maintain the student store where “Scholar Dollars” is the currency for purchasing goods such as snacks and school supplies. Additionally, the end-of-year FIRE Awards recognizes students who demonstrate that they are Focused, Intentional, Reflective and Engaged during our monthly assemblies. Costa associated with this actin include materials such as certificates, school swag, etc.	\$1,000.00	No

## Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

An explanation of how effective the specific actions were in making progress toward the goal.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

As this is a new “targeted” goal starting with the 2023-24 academic year, the analysis will be conducted in Spring 2024 to align with the completion of the LCAP Annual Update process.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$925,078	\$99,895

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
38.30%	0.00%	\$0.00	38.30%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

FY 21-22, The Charter School will implement the following goals and actions to meet our English learners' academic and social-emotional needs, socioeconomically disadvantaged, and Foster Youth.

Goal 1: Action 1--Planned services for this action item include Reading Specialist Teacher, Tutors, Specialists, Stipends, 10 Professional Development Days, 2 Extra Instructional Days, and Instructional materials for Acceleration, intervention, and enrichment.

Goal 1: Action 2—Planned services for this action item include 75% of the Executive Administrator and Lead Teacher Stipends to focus on coaching/mentoring support for teachers.

Goal 2: Action 1 --Planned services for this action item include a Coordinator of Operations and the operations team to assist with the engagement of parents.

Goal 2: Action 2--Planned services for this action item include the Program Coordinator and Operations Team will focus on attendance, the School Climate & Culture (SCC) Team (the Assistant Executive Administrator and the Academic Counselor) will work on implementing the Positive Behavior Interventions and Supports (PBIS) Framework and Programs (Title 1 & Title 4).

Goal 2: Action 3--Planned services for this action item includes funds for field trips and vendors to provide enhanced learning opportunities through enriching life experiences.

Goal 2: Action 4--Planned services for this action item includes funds to Ensure that all parents have onboarding support from the first point of LEA interest and contact through training to use all communications and technology systems to support their child's education at the charter school.

Goal 3: Action 2--Planned services for this action item include professional development for all staff members on strategies to meet our English learners' academic and social-emotional needs, socioeconomically disadvantaged, and Foster Youth.

Goal 3: Action 3--Planned services for this action item include enhance technology to customize and individualize instruction.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

FY 21-22, The Charter School has a detailed plan to increase foster youth, English learners, and low-income student services. The Charter School staff will take on a "triage" approach to screen student need, apply appropriate tiered instruction, monitor student achievement, and revise the application of instructions needed. All students will have access to grade-level instruction and resources (democracy and equity). Based on the analysis of summative and formative assessments, targeted acceleration and intervention will be provided. The focus will be to scale up. Targeted instruction will be provided to students at their level and address student-specific needs, focusing on skills needed to master grade-level content in language arts, mathematics, and English Language Development. (less is more, depth over coverage). This accelerated instruction will occur during the instructional day and enable a wide range of services from general education teachers, special education teachers, support staff, and administration. A strategic instructional program requires a multi-tiered instructional delivery model responding to each student's individual needs (personalization).

The Charter School has provided all English Learners, foster youth, and low-income with a Chromebook and a Mobile WIFI Hotspot to engage in distance learning. Teachers have incorporated Universal Design for Learning (UDL) into their distance learning for synchronous and asynchronous instruction. Teachers planned and implemented synchronous lessons. Provide small group support and designated ELD. Students are provided opportunities to engage in Designated ELD Daily. All certificated and classified worked collectively to meet the needs of English learners, foster youth, and low-income students.

Mental Health and Well-Being of All: Teachers will continue to receive professional development on trauma-teaching along with the tools and resources to move from a learner manager to a Learner Empowered (Active-Citizen).

- Incorporate welcoming/inclusion activities (develop a tone of decency and trust)
- Create learning teams and expectations (student as worker-teacher as coach)
- Use groups to get students talking (SFA the power is in the conversation)
- Set goals together (student agency)
- Core Priorities of Trauma-Informed Distance Learning



- Predictability
- Flexibility
- Connection
- Empowerment

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

FY 22-23, The Charter School has a detailed plan to increase foster youth, English learners, and low-income student services. As stated above the Charter School staff will take on a "triage" approach to screen student need, apply appropriate tiered instruction, monitor student achievement, and revise the application of instructions needed. All students will have access to grade-level, UC Doorway approved (WASC) instruction and resources (democracy and equity). Based on the analysis of summative and formative assessments, targeted acceleration and intervention will be provided. The focus will be to scale up. Targeted instruction will be provided to students at their level and address student-specific needs, focusing on skills needed to master grade-level content in language arts, mathematics, and English Language Development. (less is more, depth over coverage). This accelerated instruction will occur during the instructional day and enable a wide range of services from general education teachers, special education teachers, support staff, and administration. A strategic instructional program requires a multi-tiered instructional delivery model responding to each student's individual needs (personalization).

The Charter School has provided all English Learners, foster youth, and low-income with a Chromebook and a Mobile WIFI Hotspot to engage in distance learning. Teachers have incorporated Universal Design for Learning (UDL) into their distance learning for synchronous and asynchronous instruction. Teachers planned and implemented synchronous lessons. Provide small group support and designated ELD. Students are provided opportunities to engage in Designated ELD Daily. All certificated and classified worked collectively to meet the needs of English learners, foster youth, and low-income students.

Mental Health and Well-Being of All: Teachers will continue to receive professional development on trauma-teaching along with the tools and resources to move from a learner manager to a Learner Empowered (Active-Citizen).

- Incorporate welcoming/inclusion activities (develop a tone of decency and trust)
- Create learning teams and expectations (student as worker-teacher as coach)
- Use groups to get students talking (SFA the power is in the conversation)
- Set goals together (student agency)
- Core Priorities of Trauma-Informed Distance Learning
- Predictability
- Flexibility
- Connection
- Empowerment

Engagement of Parents and stakeholders in providing access to their student's academic and social achievements.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		1:43
Staff-to-student ratio of certificated staff providing direct services to students		1:13

## 2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$2,227,151.00	\$291,121.00		\$94,572.00	\$2,612,844.00	\$2,206,812.00	\$406,032.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Facility, Custodial, Safety & Security	All	\$220,000.00				\$220,000.00
1	1.2	Administration	English Learners Foster Youth Low Income	\$438,928.00			\$85,757.00	\$524,685.00
1	1.3	Credentialed Teachers	All	\$1,054,534.00				\$1,054,534.00
1	1.4	Paraprofessionals	Students with Disabilities		\$180,421.00			\$180,421.00
1	1.5	Professional Development	English Learners Foster Youth Low Income	\$217,839.00			\$8,815.00	\$226,654.00
1	1.6	Core Instructional Materials & Licenses	English Learners Foster Youth Low Income	\$79,472.00				\$79,472.00
1	1.7	Technology	English Learners Foster Youth Low Income	\$88,821.00				\$88,821.00
1	1.8	Local Assessments	All					
2	2.1	ELA Interventions	English Learners Foster Youth Low Income	\$84,122.00				\$84,122.00
2	2.2	ELA Instructional Support Courses	English Learners Foster Youth Low Income					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.3	Junior and Senior Seminars (ELA component)	All					
3	3.1	Math Acceleration Courses	All					
3	3.2	Targeted Math Tutoring	English Learners Foster Youth Low Income	\$2,835.00				\$2,835.00
3	3.4	Study Hall/Homework Help	All					
3	3.5	Junior and Senior Seminars (Math component)	All					
4	4.1	School-wide SFA Tools/Strategies	English Learners Foster Youth Low Income					
4	4.2	Designated ELD - Specialized Reading Support for English Learners/ELD	English Learners					
4	4.3	Equity for SWD	Students with Disabilities					
5	5.1	Advisory with SEL Component	All					
5	5.2	Student Activities & Sports Program	All	\$15,000.00				\$15,000.00
5	5.3	Culture of College Readiness	English Learners Foster Youth Low Income		\$110,700.00			\$110,700.00
5	5.4	Dual Enrollment	All					
5	5.5	Credit Recovery	English Learners Foster Youth Low Income	\$15,600.00				\$15,600.00
5	5.6	Career/Technical Education	All	\$8,000.00				\$8,000.00
5	5.7	Parent/Guardian Engagement	All	\$1,000.00				\$1,000.00
5	5.8	Positive Behavioral Interventions & Supports	All	\$1,000.00				\$1,000.00



### 2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$2,415,599	\$925,078	38.30%	0.00%	38.30%	\$927,617.00	0.00%	38.40 %	<b>Total:</b>	\$927,617.00
								<b>LEA-wide Total:</b>	\$438,928.00
								<b>Limited Total:</b>	\$0.00
								<b>Schoolwide Total:</b>	\$488,689.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Administration	Yes	LEA-wide	English Learners Foster Youth Low Income		\$438,928.00	
1	1.3	Credentialed Teachers				Specific Schools: BCCHS	\$1,054,534.00	
1	1.5	Professional Development	Yes	Schoolwide	English Learners Foster Youth Low Income		\$217,839.00	
1	1.6	Core Instructional Materials & Licenses	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS	\$79,472.00	
1	1.7	Technology	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS	\$88,821.00	
2	2.1	ELA Interventions	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS	\$84,122.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	2.2	ELA Instructional Support Courses	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS		
3	3.2	Targeted Math Tutoring	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS	\$2,835.00	
4	4.1	School-wide SFA Tools/Strategies	Yes	Schoolwide	English Learners Foster Youth Low Income			
4	4.2	Designated ELD - Specialized Reading Support for English Learners/ELD	Yes	Limited to Unduplicated Student Group(s)	English Learners			
5	5.3	Culture of College Readiness	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS		
5	5.5	Credit Recovery	Yes	Schoolwide	English Learners Foster Youth Low Income	Specific Schools: BCCHS	\$15,600.00	
5	5.6	Career/Technical Education				Specific Schools: BCCHS	\$8,000.00	

## 2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$3,111,247.00	\$2,862,321.02

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Support to increase student academic achievement	Yes	\$302,871.00	210312.79
1	1.2	Teacher Retention: Coaching Support	Yes	\$197,407.00	175446.70
2	2.1	Coordinator of Operations and Operations Team	Yes	\$134,784.00	134880
2	2.2	Assistant Executive Administrator & Academic Counselor (SSC Team)	Yes	\$236,273.00	326973
2	2.3	Student Activities	Yes	\$11,261.00	21576
2	2.4	Enrollment and Outreach- Schola and Increase ADA	Yes	\$18,000.00	45000
3	3.1	Salaries and Benefits	No	\$2,028,544.00	1761328.53
3	3.2	Professional Development	Yes	\$24,037.00	28734
3	3.3	Core Instructional Materials; Technology	No	\$56,650.00	56650
3	3.4	Supervision and Safety	No	\$55,042.00	55042



Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	3.5	Technology Enhancement	No	\$46,378.00	46378

### 2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
788711	\$820,503.00	\$821,079.96	(\$576.96)	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Support to increase student academic achievement	Yes	\$302,871.00	210312.79		
1	1.2	Teacher Retention: Coaching Support	Yes	\$197,407.00	241879		
2	2.1	Coordinator of Operations and Operations Team	Yes	\$134,784.00	134880		
2	2.2	Assistant Executive Administrator & Academic Counselor (SSC Team)	Yes	\$146,180.00	152432.17		
2	2.3	Student Activities	Yes	\$11,261.00	21576		
2	2.4	Enrollment and Outreach-Schola and Increase ADA	Yes	\$18,000.00	45000		
3	3.2	Professional Development	Yes	\$10,000.00	15000		

### 2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$1,672,177	788711	0	47.17%	\$821,079.96	0.00%	49.10%	\$0.00	0.00%

# Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

# Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
  - Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

## Plan Summary

### Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

## Requirements and Instructions

**General Information** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

**Reflections: Successes** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

**Reflections: Identified Need** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

**LCAP Highlights** – Identify and briefly summarize the key features of this year's LCAP.

**Comprehensive Support and Improvement** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## Engaging Educational Partners

## Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC Section 52064[e][1]*). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

## Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

### **Local Control and Accountability Plan:**

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1:** “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

**Prompt 2:** “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

**Prompt 3:** “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions



- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

**Focus Goal(s)**

**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

**Broad Goal**

**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

**Maintenance of Progress Goal**

**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal:** Explain how the actions will sustain the progress exemplified by the related metrics.

**Required Goals**

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

### Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2022–23</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

**Actions:** Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

**Actions for English Learners:** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

### Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants:*** Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.



**Projected Additional LCFF Concentration Grant (15 percent):** Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

**Projected Percentage to Increase or Improve Services for the Coming School Year:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

**LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar:** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year:** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

### **Required Descriptions:**

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools:** Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## For School Districts Only:

### Actions Provided on an LEA-Wide Basis:

**Unduplicated Percentage > 55 percent:** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

**Unduplicated Percentage < 55 percent:** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### Actions Provided on a Schoolwide Basis:



School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

## Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
  - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
  - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
  - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).



- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
  - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
  - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
  - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
  - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

### **LCFF Carryover Table**

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
  - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.



- 13. LCFF Carryover — Percentage (12 divided by 9)
  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
January 2022

## Coversheet

### Recommendation to approve the Local Indicators for California School Dashboard for BCCS, MORCS, and BCCHS

**Section:** V. Items Scheduled For Action  
**Item:** D. Recommendation to approve the Local Indicators for California School Dashboard for BCCS, MORCS, and BCCHS  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
4c. 22-23 BCCHS 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_Bert\_Corona\_Charter\_High\_School\_20230623.pdf  
4b. 22-23 BCCS 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_Bert\_Corona\_Charter\_School\_20230623.pdf  
4d. 22-23 MORCS 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_Monsenor\_Oscar\_Romero\_Charter\_Middle\_School\_20230623 (1).pdf  
4a. Recommendation to approve the Local Indicators for the California School Dashboard BCCS BCCHS AND MORCS.pdf

# Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Bert Corona Charter High School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Introduction

The State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area. The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at a regularly scheduled public meeting of the local governing board/body in conjunction with the adoption of the Local Control and Accountability Plan (LCAP).
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

## Performance Standards

The performance standards for the local performance indicators are:

### **Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)**

The LEA annually measures its progress in meeting the Williams settlement requirements at 100% at all of its school sites, as applicable, and promptly addresses any complaints or other deficiencies identified throughout the academic year, as applicable; the LEA then reports the results to its local governing board at a regularly scheduled meeting and to reports to educational partners and the public through the Dashboard.

### **Implementation of State Academic Standards (LCFF Priority 2)**

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Parent and Family Engagement (LCFF Priority 3)**

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

### **School Climate (LCFF Priority 6)**

The LEA administers a local climate survey at least every other year that provides a valid measure of perceptions of school safety and connectedness, such as the California Healthy Kids Survey, to students in at least one grade within the grade span(s) that the LEA serves (e.g., K-5, 6-8, 9-12), and reports the results to its local governing board at a regularly scheduled meeting of the local governing board and to educational partners and the public through the Dashboard.

### **Access to a Broad Course of Study (LCFF Priority 7)**

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)**

The county office of education (COE) annually measures its progress in coordinating instruction as required by California EC Section 48926; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

## Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

### Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

Teachers	Number	Percent
Misassignments of Teachers of English Learners	7	.04%
Total Teacher Misassignments	21	14%
Vacant Teacher Positions	0	0

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The "Good Repair" Standard (Including Deficiencies and Extreme Deficiencies)	0

### Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

#### OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) - Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics - Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

**Implementation of State Academic Standards (LCFF Priority 2)**

**OPTION 2: Reflection Tool**

**Recently Adopted Academic Standards and/or Curriculum Frameworks**

1. Rate the LEA’s progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**2. Rate the LEA’s progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**3. Rate the LEA’s progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**Other Adopted Academic Standards**

**4. Rate the LEA’s progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education					5
Health Education Content Standards					5
Physical Education Model Content Standards					5
Visual and Performing Arts					5
World Language					5

**Support for Teachers and Administrators**

**5. Rate the LEA’s success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

**Optional Narrative (Limited to 1,500 characters)**

**6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

The LEA provides teachers 10 Professional Days and the opportunity for teachers, administrator and staffs to attend any workshop requested prior to the start of school each year. Additional professional development opportunities addressing standards based instruction are provided monthly throughout the school year Provided students with access to CCSS standards-aligned instructional materials and a broad course of study. All students, including all unduplicated students and students with exceptional needs, will have access to standards-aligned materials and additional instructional materials as outlined in our charter

Metric/Method for Measuring: Teacher and student materials, purchase orders, invoices, and textbooks and materials in the classrooms.



## Parental Involvement and Family Engagement (LCFF Priority 3)

### Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: <sup>1</sup>

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

### Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
  - 1 – Exploration and Research
  - 2 – Beginning Development
  - 3 – Initial Implementation
  - 4 – Full Implementation
  - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

**Sections of the Self-Reflection Tool**

**Section 1: Building Relationships Between School Staff and Families**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Building Relationships	1	2	3	4	5
1. Rate the LEA’s progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.					5
2. Rate the LEA’s progress in creating welcoming environments for all families in the community.					5
3. Rate the LEA’s progress in supporting staff to learn about each family’s strengths, cultures, languages, and goals for their children.					5
4. Rate the LEA’s progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.					5

**Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

BCCH students came into this year ( the year after the pandemic virtual learning time) with learning loss and deficits; BCCH provided instruction and their grade level while scaffolding to ensure they made up for lost instruction. BCCH also made sure to provide authentic learning experiences and that the needs of all students were met through our support programs. Areas of growth for us would be our parent and family engagement and our school climate. Although these have historically been areas of strength for our school, the pandemic limited our ability to hold events and to have parents engaged and working on our campus. BCCH rebuilds our parent engagement in all aspects of

school, including academics, school culture, and school safety. Additionally, BCCH wanted to continue building on our successes this year in rebuilding our culture, particularly regarding our Tier 1 plan and intervention for our PBIS framework. Having regular recognition, celebration, and re-teaching of expectations will help continue to build a solid foundation for learning and success at BCCH. Partnering with Luminarious to counsel our students and families, we use Ripple effects to help students learn to strengthen their emotional and social intelligence. Parents, community representatives, classroom teachers, students, and other school personnel are included in the planning, implementing, and evaluating ConApp programs through various stakeholder meetings throughout the year, as previously discussed. All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher-school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Building Relationships Between School Staff and Families.

2021-2022: Met  
Continued engagement of parents in decision- making open communication on all levels confirmed with Youth Truth Survey

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

BCCH continues to have historically high levels of relationships with families, as evidence, in parent participation rates in student-led parent conferences, parent workshops, coffee with the Administrators, and parent surveys. In addressing the needs of the whole child and engaging parents and our school community to support each other the LEA has responded and addressed social emotional, cultural needs, for our school community. The school should continue to provide access and communication between all stakeholders.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

<b>Building Partnerships</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
5. Rate the LEA’s progress in providing professional learning and support to teachers and principals to improve a school’s capacity to partner with families.					5
6. Rate the LEA’s progress in providing families with information and resources to support student learning and development in the home.					5
7. Rate the LEA’s progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.					5
8. Rate the LEA’s progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.					5

**Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Building Partnerships for Student Outcomes.

Bert Corona Charter High School provides resources to assist under-achieving students. These include a school breakfast and lunch program, an after school program, summer school opportunities to recover units and reduce summer learning loss, and a strong student services team to assist with academics, behavior, attendance, and social-emotional wellbeing. Parents, community representatives, classroom teachers, students, and other school personnel are included in the planning, implementation, and evaluation of ConApp programs through a variety of stakeholder meetings throughout the year as previously discussed. All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Building Partnerships for Student Outcomes.

The school has established relationships with Luminaries (Local mental health providers) and the Los Angeles County Office of Education.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

BCCH student population represents 98% of underrepresented families due to its location of our charter and Free and Reduced Lunch indicators. In addition BCCH has ongoing communication with all parents, outreach to address individual students needs and regular home visits.

**Section 3: Seeking Input for Decision-Making**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Seeking Input	1	2	3	4	5
9. Rate the LEA’s progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.					5
10. Rate the LEA’s progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.					5
11. Rate the LEA’s progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.					5

Seeking Input	1	2	3	4	5
12. Rate the LEA’s progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.					5

**Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Seeking Input for Decision-Making.

The Pandemic -COVID-19 had a significant effect on providing for students via Distance Learning and support. Returning to classroom direct instruction during the 2021-2022 school years has provided administration, teachers, and staff to reassess all instructional methodology and effective instructional delivery. Presently internal measure indicate that although there has been learning loss for all students results indicate progressive growth and measures taken to support students with socio-emotional support, additional learning opportunities are offered.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Seeking Input for Decision-Making.

All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

While academic resources are important, BCCH also knew that students would not be able to perform academically if their social emotional needs were not met. BCCH counselors and support staff who are trained to provide counseling and support to our students. BCCH uses the PBIS framework to support the needs of all of our students and this, combined with our MTSS referral process, helps us to assess the needs of all students and to allocate the appropriate resources needed for each student. bCCH partnered with Luminarious to provide counseling to our students and families, and we use Ripple effects to help students learn to strengthen their emotional and social intelligence.

**School Climate (LCFF Priority 6)**

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6– 8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters). LEAs will have an opportunity to include differences among student groups, and for surveys that provide an overall score, such as the California Healthy Kids Survey, report the overall score for all students and student groups. This summary may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.
2. **MEANING:** What do the disaggregated results (if applicable) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?
3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?



BCCHS was opened in the fall of 2015 with a 9th grade cohort of 60 students. Our first full-cohort graduation was held in the spring of 2019. This cohort is still working their way through college. Our methods of grad tracking to date have been colloquial in nature, and have included asking our college-enrolled alumni to come back to our campus and address successive generations of BCCHS students about what it means to be “college ready.” Now that the first alumni from our school are within a year or two of graduating from college, we are in a process of formalizing our tracking protocols and methods. The tracking databases provided in SBE Agenda Item 14 are slated for discussion in relation to our Logic Model for BCCHS College Readiness and Success.

BCCH uses NWEA as Verifiable Data Indicator that shows the following:

The 11th grade cohort for 2021-2022 maintained or increased its participation percentage beyond the expected 95% threshold for the final verified data periodic assessment of this school year. In addition, their results demonstrate sustained growth in both reading and K-12 mathematics. The Special Education Cohort, which tested at 92% (12 out of 13 students with IEP in the 11th grade cohort of 50 students), also grew significantly. We just finished the final assessment administration last week, May 16-20, so we are continuing makeup testing this week for the 2 students in the EL cohort (10 students in the 11th grade) who did not yet finish their subtests.

Observed growth is attributed to sustained emphasis on mastery over work completion, a commitment to depth over coverage, and a consistent effort to “shrink the classroom” through pedagogy that focuses on personalization; small group differentiated instruction and support, and conferencing with individual students. In addition, our students complete “student-led” conferences twice yearly in which they give a thoughtful explanation of their growth or the lack thereof to their family members. This process requires significant reflection and ownership, which leads to growth.

11th Grade EL and LTEL students did not demonstrate growth in either math or reading as a subgroup. Why? There are several possibilities.

This group of 11th grade students spent 12 months away from school, and several spent an additional 3 months at home. The lack of direct support from teachers and peers was frustrating, and distance learning made the work of understanding English even more difficult than it already was.

Additionally, 9 of 10 of the 11th grade EL students are LTELs, meaning they have been in a space of learning English while learning in English, for over 6 years, many of them 10-12 years. Not reclassifying for so many years has reinforced deficits, misconceptions and coping strategies that are not helpful for attaining fluency in a new language. We will be providing designated time with specialist support for all EL and LTEL students in the 2022-2023 school year.

As indicated below BCCH's Dashboard results the following:

BCCH's Areas of Demonstrated Strength and/or Progress

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%.

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%.

Areas Noted for Further Growth and/or Improvement

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. 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.

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. Further analysis indicate the following:

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

(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.

The school’s percentage of LTELs is 16.5%, which is at a rate higher than the Resident Schools Median at 10.5% . 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 the following: 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.

**Access to a Broad Course of Study (LCFF Priority 7)**

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

Universal Access is available and provided to all students. Differentiated instruction and accommodations are provided with the General Education frameworks and course levels (Core Content). Broad course of study including courses described in EC sections 51210 and 51220(a)-(i).  
 Programs and services developed and provided to unduplicated pupils; and Programs and services developed and provided to individuals with exceptional needs.  
 Metric/Method for Measuring: Student Transcripts, courses approved through A-G, WASC approved and certified.

**Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)**

**Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.**

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration					



Coordinating Instruction	1	2	3	4	5
and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

**Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Services	1	2	3	4	5
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					

# Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Bert Corona Charter School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Introduction

The State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area. The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at a regularly scheduled public meeting of the local governing board/body in conjunction with the adoption of the Local Control and Accountability Plan (LCAP).
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

## Performance Standards

The performance standards for the local performance indicators are:

### **Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)**

The LEA annually measures its progress in meeting the Williams settlement requirements at 100% at all of its school sites, as applicable, and promptly addresses any complaints or other deficiencies identified throughout the academic year, as applicable; the LEA then reports the results to its local governing board at a regularly scheduled meeting and to reports to educational partners and the public through the Dashboard.

### **Implementation of State Academic Standards (LCFF Priority 2)**

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Parent and Family Engagement (LCFF Priority 3)**

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

### **School Climate (LCFF Priority 6)**

The LEA administers a local climate survey at least every other year that provides a valid measure of perceptions of school safety and connectedness, such as the California Healthy Kids Survey, to students in at least one grade within the grade span(s) that the LEA serves (e.g., K-5, 6-8, 9-12), and reports the results to its local governing board at a regularly scheduled meeting of the local governing board and to educational partners and the public through the Dashboard.

### **Access to a Broad Course of Study (LCFF Priority 7)**

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)**

The county office of education (COE) annually measures its progress in coordinating instruction as required by California EC Section 48926; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

## Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

### Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

Teachers	Number	Percent
Misassignments of Teachers of English Learners	1	.008%
Total Teacher Misassignments	5	.04%
Vacant Teacher Positions	0	0

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The "Good Repair" Standard (Including Deficiencies and Extreme Deficiencies)	0

### Implementation of State Academic Standards (LCFF Priority 2)

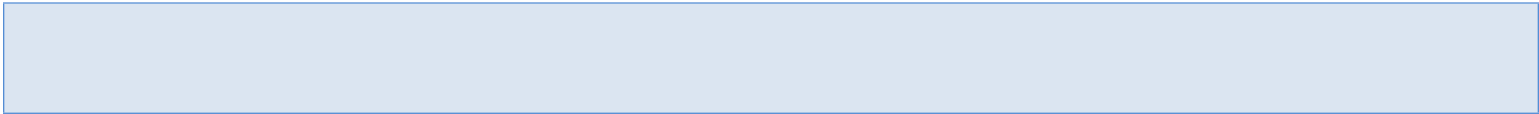
LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

#### OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) - Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics - Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language



**Implementation of State Academic Standards (LCFF Priority 2)**

**OPTION 2: Reflection Tool**

**Recently Adopted Academic Standards and/or Curriculum Frameworks**

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**2. Rate the LEA’s progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**3. Rate the LEA’s progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**Other Adopted Academic Standards**

**4. Rate the LEA’s progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education					5
Health Education Content Standards					5
Physical Education Model Content Standards					5
Visual and Performing Arts					5
World Language					5

**Support for Teachers and Administrators**

**5. Rate the LEA’s success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

**Optional Narrative (Limited to 1,500 characters)**

**6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

The LEA provides teachers 10 Professional Days and the opportunity for teachers, administrators, and staff to attend any workshop requested before school starts each year. Additional professional development opportunities addressing standards-based instruction are provided monthly throughout the school year; provided students with access to CCSS standards-aligned instructional materials and a broad course of study. All students, including all unduplicated students and students with exceptional needs, will have access to standards-aligned materials and additional instructional materials as outlined in our charter.

Metric/Method for Measuring: Teacher and student materials, purchase orders, invoices, and textbooks and materials in the classrooms.



## Parental Involvement and Family Engagement (LCFF Priority 3)

### Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: <sup>1</sup>

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

### Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
  - 1 – Exploration and Research
  - 2 – Beginning Development
  - 3 – Initial Implementation
  - 4 – Full Implementation
  - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

**Sections of the Self-Reflection Tool**

**Section 1: Building Relationships Between School Staff and Families**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Building Relationships	1	2	3	4	5
1. Rate the LEA’s progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.					5
2. Rate the LEA’s progress in creating welcoming environments for all families in the community.					5
3. Rate the LEA’s progress in supporting staff to learn about each family’s strengths, cultures, languages, and goals for their children.					5
4. Rate the LEA’s progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.					5

**Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

BCCS students came into this year (only a full year out of the pandemic virtual learning time) and continue to have learning loss and deficits; BCCS provided instruction and their grade level while scaffolding to ensure they made up for lost instruction. BCCS also ensured to provide authentic learning experiences and that the needs of all students were met through our support programs. Areas of growth for us would be our parent and family engagement and school climate. Although these have historically been areas of strength for our school, the pandemic limited our ability to hold events and to have parents

engaged and working on our campus. BCCS rebuilds our parent engagement in all aspects of school, including academics, school culture, and school safety. Additionally, BCCS wanted to continue building on our successes this year in rebuilding our culture, particularly regarding our Tier 1 plan and intervention for our PBIS framework. Having regular recognition, celebration, and re-teaching of expectations will help continue to build a solid foundation for learning and success at BCCS. Partnering with Luminarious to counsel our students and families, we use Ripple effects to help students learn to strengthen their emotional and social intelligence.

Parents, community representatives, classroom teachers, students, and other school personnel are included in the planning, implementing, and evaluating ConApp programs through various stakeholder meetings throughout the year, as previously discussed. All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher-school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

- Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Building Relationships Between School Staff and Families.

2021-2022: Met

Continued engagement of parents in decision- making open communication on all levels confirmed with Youth Truth Survey

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

The LEA continues to have historically high levels of relationships with families, as evidence, in parent participation rates in student-led parent conferences, parent workshops, coffee with the Administrators, and parent surveys. In addressing the needs of the whole child and engaging parents and our school community to support each other the LEA has responded and addressed social emotional, cultural needs, for our school community. The school should continue to provide access and communication between all stakeholders.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Building Partnerships	1	2	3	4	5
5. Rate the LEA’s progress in providing professional learning and support to teachers and principals to improve a school’s capacity to partner with families.					5
6. Rate the LEA’s progress in providing families with information and resources to support student learning and development in the home.					5
7. Rate the LEA’s progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.					5

Building Partnerships	1	2	3	4	5
8. Rate the LEA’s progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.					5

**Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Building Partnerships for Student Outcomes.

BCCS provides resources to assist under-achieving students. These include school breakfast and lunch program, an after-school program, summer school opportunities to recover units and reduce summer learning loss, and a strong student services team to assist with academics, behavior, attendance, and social-emotional wellbeing. Parents, community representatives, classroom teachers, students, and other school personnel are included in the planning, implementation, and evaluation of ConApp programs through various stakeholder meetings throughout the year, as previously discussed. All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Building Partnerships for Student Outcomes.

The school has established relationships with Luminaries (Local mental health providers) and the Los Angeles County Office of Education.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

BCCS student population represents 98% of underrepresented families due to its location of our charter and Free and Reduced Lunch indicators. In addition BCCS has ongoing communication with all parents, outreach to address individual students needs and regular home visits.

**Section 3: Seeking Input for Decision-Making**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Seeking Input	1	2	3	4	5
9. Rate the LEA’s progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.					5
10. Rate the LEA’s progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.					5

Seeking Input	1	2	3	4	5
11. Rate the LEA’s progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.					5
12. Rate the LEA’s progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.					5

**Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Seeking Input for Decision-Making.

The Pandemic -COVID-19 had a significant effect on providing for students via Distance Learning and support. Returning to classroom direct instruction during the 2021-2022 school years has provided administration, teachers, and staff to reassess all instructional methodology and effective instructional delivery. Presently internal measure indicate that although there has been learning loss for all students results indicate progressive growth and measures taken to support students with socio-emotional support, additional learning opportunities are offered.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Seeking Input for Decision-Making.

All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

While academic resources are important, BCCS also knew that students would not be able to perform academically if their social emotional needs were not met. BCCS counselors and support staff who are trained to provide counseling and support to our students. BCCS uses the PBIS framework to support the needs of all of our students and this, combined with our MTSS referral process, helps us to assess the needs of all students and to allocate the appropriate resources needed for each student. bCCS partnered with Luminarious to provide counseling to our students and families, and we use Ripple effects to help students learn to strengthen their emotional and social intelligence. To further meet all the needs of all students, our school has been fortunate to be the recipient of two grants: the ELOP grant and the Community Schools grant. These grants will allow us to expand our extended learning programs before and after school, during breaks, and during the summer. Additionally, they will allow us to plan to meet the needs of families in addition to the needs of our students, thus increasing student potential for achievement.

**School Climate (LCFF Priority 6)**

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6– 8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters). LEAs will have an opportunity to include differences among student groups, and for surveys that provide an overall score, such as the California Healthy Kids Survey, report the overall score for all students and student groups. This summary may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.



2. **MEANING:** What do the disaggregated results (if applicable) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?
3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

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

- The schoolwide Dashboard Suspension Rate Indicator color is green. Bert Corona Middle School’s percentage of students suspended at least once was 6.2%, which was higher than the State’s at 3.4%.
- The school reclassifies English Learners at 14.9%, which is higher than the state average at 13.8%.

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

- The schoolwide Dashboard ELA Indicator color is red. Bert Corona Middle School’s 2019 Average DFS was -78.2%, which is lower than the State 2019 Average DFS at -2.5%.
- The schoolwide Dashboard Math Indicator color is red. Bert Corona Middle School’s 2019 Average DFS was -109.5%, which is higher than the State’s 2019 Average DFS at -33.5%.
- The schoolwide Dashboard Chronic Absenteeism Indicator color is yellow. Bert Corona Middle School’s 2019 Chronic Absenteeism Percentage was 7.0%, lower than the State at 10.1%.
- All numerically significant subgroups have “Status/Distance From Standard (DFS)” scores are below the statewide averages in ELA, as follows: English Learners at -107.2 vs. -45.1 points; Latino at -78.9 vs. -26.6 points; Socioeconomically Disadvantaged at -78.7 vs. -30.1 points; and Students with Disabilities at -137.0 vs. -88.1 points.
- All numerically significant subgroups have “Status/Distance From Standard (DFS)” scores below the statewide averages in Math, as follows: English Learners at -138.8 vs. -68.6 points; Latino at -110.8 vs. -62.2 points; Socioeconomically Disadvantaged at -109.9 vs. -63.7 points; and Students with Disabilities at -176.7 vs. -119.4 points.

The school leadership notes a renewed focus include:

- Relay’s Get Better Faster training for instructional coaches to coach and support teachers. There is a need for greater coaching and support for teachers to provide real-time feedback, action steps, and collaborative planning.
- Newly adopted Ready Math curriculum and time provided to implement a common placing plan, scaffolded lessons, and common exit tickets to support the implementation.
- iReady implementation to provide teachers with actionable data and to support the intervention plans.
- SFA/reading block
- Scheduled tutor support to work on language development through pull-out tutoring.
- LTEL reclassification training for teachers and parents.
- Critical Friends Groups
- Observational Rounds and mentor teachers.

**Access to a Broad Course of Study (LCFF Priority 7)**

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student

groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

Universal Access is available and provided to all students. Differentiated instruction and accommodations are provided with the General Education frameworks and course levels (Core Content). Broad course of study including courses described in EC sections 51210 and 51220(a)-(i).  
 Programs and services developed and provided to unduplicated pupils, and Programs and services developed and provided to individuals with exceptional needs.  
 Metric/Method for Measuring: Student Transcripts

**Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)**

**Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.**

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who					

<b>Coordinating Instruction</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

**Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					



<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.</p>					

# Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Monsenor Oscar Romero Charter School	Yvette King Berg Executive Director	ykingberg@ypics.org (818) 305-2791

## Introduction

The State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area. The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at a regularly scheduled public meeting of the local governing board/body in conjunction with the adoption of the Local Control and Accountability Plan (LCAP).
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

## Performance Standards

The performance standards for the local performance indicators are:

### **Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)**

The LEA annually measures its progress in meeting the Williams settlement requirements at 100% at all of its school sites, as applicable, and promptly addresses any complaints or other deficiencies identified throughout the academic year, as applicable; the LEA then reports the results to its local governing board at a regularly scheduled meeting and to reports to educational partners and the public through the Dashboard.

### **Implementation of State Academic Standards (LCFF Priority 2)**

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Parent and Family Engagement (LCFF Priority 3)**

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

### **School Climate (LCFF Priority 6)**

The LEA administers a local climate survey at least every other year that provides a valid measure of perceptions of school safety and connectedness, such as the California Healthy Kids Survey, to students in at least one grade within the grade span(s) that the LEA serves (e.g., K-5, 6-8, 9-12), and reports the results to its local governing board at a regularly scheduled meeting of the local governing board and to educational partners and the public through the Dashboard.

### **Access to a Broad Course of Study (LCFF Priority 7)**

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)**

The county office of education (COE) annually measures its progress in coordinating instruction as required by California EC Section 48926; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

## Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

### Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

Teachers	Number	Percent
Misassignments of Teachers of English Learners	1	.01%
Total Teacher Misassignments	4	.04%
Vacant Teacher Positions	0	

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The "Good Repair" Standard (Including Deficiencies and Extreme Deficiencies)	0

### Implementation of State Academic Standards (LCFF Priority 2)

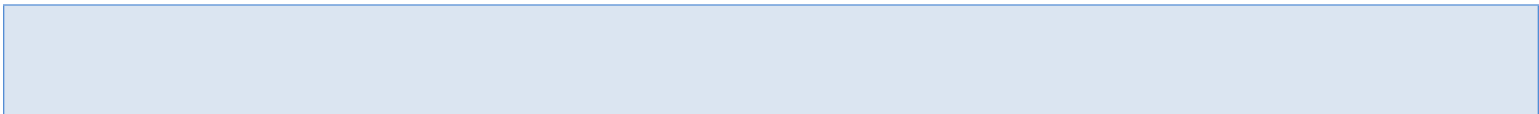
LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

#### OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) - Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics - Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language



**Implementation of State Academic Standards (LCFF Priority 2)**

**OPTION 2: Reflection Tool**

**Recently Adopted Academic Standards and/or Curriculum Frameworks**

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**2. Rate the LEA’s progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**3. Rate the LEA’s progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards					5
History-Social Science					5

**Other Adopted Academic Standards**

**4. Rate the LEA’s progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education					5
Health Education Content Standards					5
Physical Education Model Content Standards					5
Visual and Performing Arts					5
World Language					5

**Support for Teachers and Administrators**

**5. Rate the LEA’s success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

**Optional Narrative (Limited to 1,500 characters)**

**6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

The LEA provides teachers 15 Professional Days and the opportunity for teachers, administrators, and staff to attend any workshop requested before school starts each year. Additional professional development opportunities addressing standards-based instruction are provided monthly throughout the school year; provided students with access to CCSS standards-aligned instructional materials and a broad course of study. All students, including all unduplicated students and students with exceptional needs, will have access to standards-aligned materials and additional instructional materials as outlined in our charter.

Metric/Method for Measuring: Teacher and student materials, purchase orders, invoices, and textbooks and materials in the classrooms.



## Parental Involvement and Family Engagement (LCFF Priority 3)

### Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: <sup>1</sup>

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

### Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
  - 1 – Exploration and Research
  - 2 – Beginning Development
  - 3 – Initial Implementation
  - 4 – Full Implementation
  - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

**Sections of the Self-Reflection Tool**

**Section 1: Building Relationships Between School Staff and Families**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Building Relationships	1	2	3	4	5
1. Rate the LEA’s progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.					5
2. Rate the LEA’s progress in creating welcoming environments for all families in the community.					5
3. Rate the LEA’s progress in supporting staff to learn about each family’s strengths, cultures, languages, and goals for their children.					5
4. Rate the LEA’s progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.					5

**Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

2022-2023: Met:  
 Survey Ranked the school in Meet with School Culture and Climate the 49th percentile team in the spring/summer of 2022. (compared with 65th)

- Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Building Relationships Between School Staff and Families.

2022-2023: Met

Continued engagement of parents in decision- making open communication on all levels confirmed with Youth Truth Survey..Continued engagement of parents in decision- making open communication on all levels confirmed with Youth Truth Survey. Parent engagement 83% (increased 13%), Relationship with the School 92% (increased by 10%) , Culture 90% (Increase of 25%)

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

The LEA continues to have historically high levels of relationships with families, as evidence, in parent participation rates in student-led parent conferences, parent workshops,, Coffee with the Administrators, and parent surveys. In addressing the needs of the whole child and engaging parents and our school community to support each other the LEA has responded and addressed social emotional, cultural needs, for our school community. The school should continue to provide access and communication between all stakeholders.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Building Partnerships	1	2	3	4	5
5. Rate the LEA’s progress in providing professional learning and support to teachers and principals to improve a school’s capacity to partner with families.					5
6. Rate the LEA’s progress in providing families with information and resources to support student learning and development in the home.					5
7. Rate the LEA’s progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.					5
8. Rate the LEA’s progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.					5

## Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Building Partnerships for Student Outcomes.

The Charter School provides resources to assist underachieving students. These include a breakfast and lunch program, an after-school program, summer school opportunities to recover units and reduce summer learning loss, and a strong student services team to assist with academics, behavior, attendance, and social-emotional well-being.

Parents, community representatives, classroom teachers, students, and other school personnel are included in the planning, implementing, and evaluating ConApp programs through various stakeholder meetings throughout the year, as previously discussed. All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher-school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings.

- Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

The school has established relationships with Luminaries (Local mental health providers) and the Los Angeles County Office of Education.

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

MORCS student population represents 94.08% of underrepresented families due to its location of our charter and Free and Reduced Lunch indicators. In addition MORCS has ongoing communication with all parents, outreach to address individual students needs and regular home visits.

### Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Seeking Input	1	2	3	4	5
9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.					5
10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.					5
11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.					5
12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.					5

### Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

The Pandemic -COVID-19 had a significant effect on providing for students via Distance Learning and support. Returning to classroom direct instruction during the 2021-2022 and the impact is still being in 2022-2023 school years has provided administration, teachers, and staff to reassess all instructional methodology and effective instructional delivery. Presently verifiable data measures indicate that although there has been learning loss for all students results indicate progressive growth and measures taken to support students with socio-emotional support, additional learning opportunities has resulted along with the additional social emotional support needs of our families and students. The following verifiable data measures student academic growth.

#### i-Ready Typical Growth Metric

i-Ready provides a normed target known as the “Typical Growth” target based on students who placed similarly on the initial Diagnostic. Typical growth is the one year normed target growth for students. It is based on the average annual growth for a student at that particular chronological grade and initial placement level. Growth targets are normed but based on criterion growth. Subsequent Diagnostics measure students’ growth towards that goal. For more information on how typical growth data represents normed data, please see: [https://i-readycentral.com/download/?res=427&view\\_pdf=1](https://i-readycentral.com/download/?res=427&view_pdf=1).

#### Summary Analysis of Results

Realized gain of 13% proficiency in Math and 14% in Reading over the course of the school year according to i-Ready diagnostic scores!

Increase of 5% proficiency in Math and 7% in Reading comparing last year’s iReady fall diagnostic to this year’s fall test

Implemented new i-Ready math curriculum and a new Math Support instructional block to support math proficiency  
Created English Learner Snapshots in order to collaboratively communicate needs, goals, and action plans for all EL students

Added Ellevation Platform for ELs in English and Mathematics.

MORCS’ subgroups, Els, Students with Disabilities, Latino, and Socioeconomically Disadvantaged students made significant progress on their iReady diagnostics (Verified Data) throughout the school year (see table below). This is an indicator that many of the learning gaps are being closed and also serves as evidence that these subgroups are making progress toward reaching grade-level mastery. With the continued focus in their support classes, all students, including those listed under our significant student groups, will continue to improve academically and will reflect mastery in their CAASPP and iReady Diagnostic tests

#### Description of Verified Data

Our verified data is from Curriculum Associates’ i-Ready diagnostic assessments. Curriculum Associates has been recognized nationally for their dedication to providing resources to drive learning in schools.

#### i-Ready Typical Growth Metric

i-Ready provides a normed target known as the “Typical Growth” target based on students who placed similarly on the initial Diagnostic. Typical growth is the one year normed target growth for students. It is based on the average annual growth for a student at that particular chronological grade and initial placement level. Growth targets are normed but based on criterion growth. Subsequent Diagnostics measure students’ growth towards that goal. The growth measures shared here are based on half a school year of instruction, which makes the target metric for minimum expected growth 50%. Above average growth (greater than 50%) is indicated by blue shading. Significant growth is indicated by green shading (above 99%). Based on these results we are on track to expect average growth of at least one-year schoolwide and for each subgroup of students. We anticipate this will be verified by the May 2022 administration of the diagnostic.

##### I. iReady Diagnostic Exams - General Info

-More students tested in the Winter than in the Fall (98% and 97% compared with 92% and 89% respectively in Math and Reading total enrollment levels were the same during both testing sessions

-12 weeks in between testing sessions

##### II. iReady Results (MATH)

#### ALL STUDENTS (MATH)

#### BY GRADE LEVEL (MATH)



**Analysis:**

-Students “On or Above” Grade level increased from 6% to 11% in Math from D1 to D2 -Students “Two or More Grade Levels Below” decreased from 71% to 61% from D1 to D2

- Median Progress to Annual Typical Growth is at 73% overall for all students in math  
 - 8th grade math saw the highest growth at 108% median growth and 42% stretch growth -All grade levels showing growth from D1 to D2 in Math

**Reading:**

-Students “On or Above” Grade level increased from 13% to 17% in Reading from D1 to D2 -Students “Two or More Grade Levels Below” decreased from 72% to 63% from D1 to D2 -Median Progress to Annual Typical Growth is at 97% overall for all students in reading

-7th grade reading saw the highest growth at 124% median growth and 42% stretch growth - All grade levels showing growth from D1 to D2 in Reading

**Subgroups**

-At 7th and 8th grade level, Special Education students demonstrated more growth in Reading than English Learners and All Students (note: 7th grade Special Education students demonstrated almost twice as much growth as the other groups!).

-At all grade levels, Special Education students demonstrated growth of over 100% in Reading (projecting growth of over 200% by the end of the school year)

-8th grade students and English Learners demonstrated significant growth in Math (over 100%) especially as compared to other grade levels (projecting growth of over 200% by the end of the school year)

-7th grade students, 7th grade English Learners, and 7th grade Special Education students demonstrated significant growth in Reading (over 100%) especially as compared to other grade levels

-Special Education students comparatively demonstrated low growth in math at all grade levels. Despite this, 6th and 8th grade are still projected to go over 100% growth by the end of the year.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Seeking Input for Decision-Making.

All stakeholders are encouraged to attend and provide feedback at board meetings, school advisory council meetings, weekly teacher school meetings, student leadership team meetings, academic instructional team meetings, and school climate and culture team meetings. Additionally, all stakeholders are encouraged to participate in school surveys such as the Annual Youth Truth Survey, the Annual Parent Conference Survey, and others surveys conducted throughout the school year.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Parents, teachers and students were polled regarding issues on student learning and all elements affecting student learning.

- Polled staff, students and parents using 2022 Youth Truth targeted questions about school safety survey, students and culture in the spring of 2022 84% (increased 16% from the prior year).
- Ranked the school in Meet with School Culture and Climate the 90%.
- Used a strategic planning process for CA schools and identified a specific vision and goal(s) for school culture in 2021-22 and the results reveal that the action planning and activities were successful realizing a 25% increase in Positive Attitude in School Culture..
- The action plan includes quarterly check-ins to ensure that the implementation was successful by actively monitoring benchmarks and activities.

## School Climate (LCFF Priority 6)

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6–8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters). LEAs will have an opportunity to include differences among student groups, and for surveys that provide an overall score, such as the California Healthy Kids Survey, report the overall score for all students and student groups. This summary may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.
2. **MEANING:** What do the disaggregated results (if applicable) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?
3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

The schoolwide Dashboard Suspension Rate Indicator color is yellow. The Charter School's percentage of students suspended at least once was 12.0%, higher than the State's at 3.4%. The school's leadership has noted the following:

- Hiring a New Executive Administrator and Coordinator of Culture and Climate.
- Hiring of Coordinator of Student Services and School Culture and Climate Manager.
- Student behavior management training with Restorative Practices and full PD days dedicated to training staff on providing students with socio-emotional supports.
- Positive Behavior Support Systems Team meets and monitors the highest need for behavioral intervention and socio-emotional support.
- Student Success and Progress teams of staff and family members to assist students in improving poor academic, behavioral, and attendance metrics. Relationships among students and teachers continue to be a high priority for the school.

The suspension rate increased slightly for English learners by 2.3%, and for Students with Disabilities, 2.7%. A notable decline of 2.4% for Social Economically Disadvantaged and Hispanic has declined 2.4%. Using the Multi-Tiered process schoolwide is in place, with additional support and intervention provided through social-emotional learning and counseling. The key is ensuring that all stakeholders have the training, systems, and support needed to create an outstanding positive school climate each year.

## Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

All students are measured with these locally selected measures.

ELA CAASPP/  
CAASPP/Smarter Balance  
Interim School-Based Quarterly Assessments,  
Teacher-Made Tests, Portfolios,  
Service Learning Projects

i-Ready  
 Houghton Mifflin Reading Inventory  
 Success For All  
 Ellevation Platform for ELA and Mathematics (ELs)  
 Use of the same grading scale for all students  
 NEXT Generation Science Interim School-  
 ESSA Requirements

- Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

Monseñor Oscar Romero Charter will maintain clear and high expectations for its students and their academic achievements. The school will meet the benchmarks set forth under AB 1505, by outperforming and meeting its State growth targets. All data disaggregated to show how sub-groups such as English Learners, non- English Learners, mobility, gender, and other relevant sub-groups perform. The school administrators, staff, and teachers will be held accountable to the Board for meeting the school outcome goals. Monseñor Oscar Romero Charter will pursue the following outcome goals. Pursuant to AB1505. The Monseñor Oscar Romero Charter will meet all State growth targets.

All students are measure with these locally selected measures

ELA CAASPP/  
 CAASPP/Smarter Balance  
 Interim School-Based Quarterly Assessments,  
 Teacher-Made Tests, Portfolios,  
 Service Learning Projects  
 i-Ready  
 Success For All  
 Ellevation Platform for ELA and Mathematics (ELs)  
 Use of the the same grading scale for all students  
 NEXT Generation Science Interim School-  
 ESSA Requirements

These measures are administered as required:

Yearly  
 Quarterly  
 Ongoing

- Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

MORCS Academic Review and Results  
 Realized gain of 13% proficiency in Math and 14% in Reading over the school year according to i-Ready diagnostic scores!  
 Increase of 5% proficiency in Math and 7% in Reading comparing last year's iReady fall diagnostic to this year's fall test  
 Implemented i-Ready math curriculum and a new Math Support instructional block to support math proficiency



Created English Learner Snapshots to collaboratively communicate needs, goals, and action plans for all EL students

Added Ellevation Platform for ELs in English and Mathematics

Due to the Pandemic, MORCS distributed over 130 additional Chromebooks and 51 hotspots to families. In March 2020, 61% of MORCS families had internet access and a working computer for their child, compared to 97% in May 2020. All other students already had assigned home computers.

Rapidly transitioned academic program to full distance learning on March 17th, within 1 day of campus closure due to the pandemic

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

Universal Access is available and provided to all students. Differentiated instruction and accommodations are provided with the General Education frameworks and course levels (Core Content). Broad course of study including courses described in EC sections 51210 and 51220(a)-(i).

Programs and services developed and provided to unduplicated pupils, and Programs and services developed and provided to individuals with exceptional needs.

Metric/Method for Measuring: Student Transcripts

### Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who					

<b>Coordinating Instruction</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

**Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.</p>					



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve the Local Indicators for the California School Dashboard for Bert Charter School, Bert Corona Charter High School, and Monseñor Oscar Romero Charter School**

### BACKGROUND

In February 2021, the State Board of Education (SBE) approved standards for the local indicators that support local educational agencies (LEAs) in measuring and reporting their progress within the appropriate priority area. For each local indicator, the performance standards are as follows:

1. Annually measure its progress in meeting the requirements of the specific LCFF priority; and
2. Report the results as part of a non-consent item at a regularly scheduled public meeting of the local governing board/body in conjunction with the adoption of the LCAP; and
3. Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

LCFF Priority #	LCFF Priority Area	Performance Indicator
<b>One</b>	Appropriately Assigned Teachers; Access to Curriculum-Aligned Instructional Materials; and Safe, Clean and Functional School Facilities	Data elements that are required as part of School Accountability Report Card (SARC)
<b>Two</b>	Implementation of State Academic Standards	Choice of narrative summary or self-reflection tool survey

<b>Three</b>	Parent and Family Engagement	Self-reflection tool addressing three areas of parent and family engagement (includes narrative & survey)
<b>Six</b>	School Climate	Narrative Summary of the administration and analysis of student survey

<b>Seven</b>	Access to a Broad Course of Study	Narrative Summary
--------------	-----------------------------------	-------------------

An LEA uses the SBE-adopted self-reflection tools to report its progress through the Dashboard. The collection and reflection on locally available information relevant to progress regarding local priority areas will support LEAs in completing the self-reflection tools, reporting in the Dashboard, and in local planning and improvement efforts.

**ANALYSIS**

As required by the CDE, LCFF Priority Areas (Priority 1: Basic Services and Conditions; Priority 2: Implementation of Academic Standards; Priority 3: Parent Engagement; Priority 6: School Climate; Priority 7: Access to a Broad Course of Study) were completed for each site and are presented here for review and discussion prior to requested Board approval.

**RECOMMENDATION**

It is recommended that the Board of Directors approve the Local Indicators for the California School Dashboard for BCCS, BCCHS, and MORCS.

# Coversheet

## Recommendation to Ratify the Preliminary 2023-2024 Budgets

**Section:** V. Items Scheduled For Action  
**Item:** E. Recommendation to Ratify the Preliminary 2023-2024 Budgets  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 19-64733-0106872 BCCS Budget.pdf  
19-64733-0132126 BCHS Budget.pdf  
19-64733-0114959 MORCS Budget.pdf

Bert Corona Charter  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0106872  
Form 62  
E8BHNZWR(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	4,015,999.81	4,585,887.54	14.2%
2) Federal Revenue		8100-8299	1,203,236.57	1,447,874.63	20.3%
3) Other State Revenue		8300-8599	1,337,986.45	1,331,900.06	-0.5%
4) Other Local Revenue		8600-8799	553,653.55	426,218.89	-23.0%
5) TOTAL, REVENUES			7,110,876.38	7,791,881.12	9.6%
<b>B. EXPENSES</b>					
1) Certificated Salaries		1000-1999	1,831,772.77	2,290,161.80	25.0%
2) Classified Salaries		2000-2999	909,688.78	1,087,410.48	19.5%
3) Employee Benefits		3000-3999	846,313.54	1,001,455.91	18.3%
4) Books and Supplies		4000-4999	907,470.77	864,134.75	-4.8%
5) Services and Other Operating Expenses		5000-5999	2,304,356.33	2,343,324.42	1.7%
6) Depreciation and Amortization		6000-6999	87,056.85	80,246.06	-7.8%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.0%
9) TOTAL, EXPENSES			6,886,659.04	7,666,733.42	11.3%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)</b>			224,217.34	125,147.70	-44.2%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			224,217.34	125,147.70	-44.2%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	3,050,477.87	3,466,680.21	13.6%
b) Audit Adjustments		9793	191,985.00	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			3,242,462.87	3,466,680.21	6.9%
d) Other Restatements		9795	0.00	209,258.50	New
e) Adjusted Beginning Net Position (F1c + F1d)			3,242,462.87	3,675,938.71	13.4%
2) Ending Net Position, June 30 (E + F1e)			3,466,680.21	3,801,086.41	9.6%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	239,860.16	209,258.50	-12.8%
b) Restricted Net Position		9797	192,466.96	217,013.16	12.8%
c) Unrestricted Net Position		9790	3,034,353.09	3,374,814.75	11.2%
<b>G. ASSETS</b>					
1) Cash					
a) in County Treasury		9110	0.00		
1) Fair Value Adjustment to Cash in County Treasury		9111	0.00		
b) in Banks		9120	0.00		
c) in Revolving Cash Account		9130	0.00		
d) with Fiscal Agent/Trustee		9135	0.00		
e) Collections Awaiting Deposit		9140	0.00		
2) Investments		9150	0.00		
3) Accounts Receivable		9200	0.00		
4) Due from Grantor Government		9290	0.00		
5) Due from Other Funds		9310	0.00		
6) Stores		9320	0.00		
7) Prepaid Expenditures		9330	0.00		
8) Other Current Assets		9340	0.00		
9) Lease Receivable		9380	0.00		
10) Fixed Assets					
a) Land		9410	0.00		
b) Land Improvements		9420	0.00		
c) Accumulated Depreciation - Land Improvements		9425	0.00		
d) Buildings		9430	0.00		



Bert Corona Charter  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0106872  
Form 62  
E8BHNZW97R(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
e) Accumulated Depreciation - Buildings		9435	0.00		
f) Equipment		9440	0.00		
g) Accumulated Depreciation - Equipment		9445	0.00		
h) Work in Progress		9450	0.00		
i) Lease Assets		9460	0.00		
j) Accumulated Amortization-Lease Assets		9465	0.00		
k) Subscription Assets		9470	0.00		
l) Accumulated Amortization-Subscription Assets		9475	0.00		
11) TOTAL, ASSETS			0.00		
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>					
1) Deferred Outflows of Resources		9490	0.00		
2) TOTAL, DEFERRED OUTFLOWS			0.00		
<b>I. LIABILITIES</b>					
1) Accounts Payable		9500	0.00		
2) Due to Grantor Governments		9590	0.00		
3) Due to Other Funds		9610	0.00		
4) Current Loans		9640	0.00		
5) Unearned Revenue		9650	0.00		
6) Long-Term Liabilities					
a) Subscription Liability		9660	0.00		
b) Net Pension Liability		9663	0.00		
c) Total/Net OPEB Liability		9664	0.00		
d) Compensated Absences		9665	0.00		
e) COPs Payable		9666	0.00		
f) Leases Payable		9667	0.00		
g) Lease Revenue Bonds Payable		9668	0.00		
h) Other General Long-Term Liabilities		9669	0.00		
7) TOTAL, LIABILITIES			0.00		
<b>J. DEFERRED INFLOWS OF RESOURCES</b>					
1) Deferred Inflows of Resources		9690	0.00		
2) TOTAL, DEFERRED INFLOWS			0.00		
<b>K. NET POSITION</b>					
(G11 + H2) - (I7 + J2)			0.00		
<b>LCFF SOURCES</b>					
Principal Apportionment					
State Aid - Current Year		8011	2,351,225.59	2,727,430.76	16.0%
Education Protection Account State Aid - Current Year		8012	687,460.82	778,227.41	13.2%
State Aid - Prior Years		8019	0.00	0.00	0.0%
LCFF Transfers					
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	977,313.40	1,080,229.37	10.5%
Property Taxes Transfers		8097	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			4,015,999.81	4,585,887.54	14.2%
<b>FEDERAL REVENUE</b>					
Maintenance and Operations		8110	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	0.0%
Child Nutrition Programs		8220	368,906.91	352,167.03	-4.5%
Donated Food Commodities		8221	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	75,467.72	79,560.21	5.4%
Title I, Part A, Basic	3010	8290	131,172.00	131,172.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	16,901.00	16,901.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	12,354.20	12,469.60	0.9%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3150, 3155, 3180, 3182, 4037, 4124, 4126, 4127, 4128, 5630	8290	10,000.00	10,000.00	0.0%

Bert Corona Charter  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0106872  
Form 62  
E8BHNZW97R(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Career and Technical Education	3500-3599	8290	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	588,434.74	845,604.79	43.7%
TOTAL, FEDERAL REVENUE			1,203,236.57	1,447,874.63	20.3%
<b>OTHER STATE REVENUE</b>					
Other State Apportionments					
Special Education Master Plan					
Current Year	6500	8311	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.0%
Child Nutrition Programs		8520	139,900.33	137,403.76	-1.8%
Mandated Costs Reimbursements		8550	5,699.00	6,098.16	7.0%
Lottery - Unrestricted and Instructional Materials		8560	79,376.32	77,081.88	-2.9%
After School Education and Safety (ASES)	6010	8590	203,482.84	203,482.84	0.0%
Charter School Facility Grant	6030	8590	185,879.66	279,541.50	50.4%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.0%
Specialized Secondary	7370	8590	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	723,648.30	628,291.92	-13.2%
TOTAL, OTHER STATE REVENUE			1,337,986.45	1,331,900.06	-0.5%
<b>OTHER LOCAL REVENUE</b>					
Sales					
Sale of Equipment/Supplies		8631	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.0%
Interest		8660	0.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.0%
Fees and Contracts					
Child Development Parent Fees		8673	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.0%
Interagency Services		8677	429,324.97	348,318.89	-18.9%
All Other Fees and Contracts		8689	0.00	0.00	0.0%
All Other Local Revenue		8699	124,328.58	77,900.00	-37.3%
Tuition		8710	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.0%
Transfers of Apportionments					
Special Education SELPA Transfers					
From Districts or Charter Schools	6500	8791	0.00	0.00	0.0%
From County Offices	6500	8792	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.0%
Other Transfers of Apportionments					
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			553,653.55	426,218.89	-23.0%
TOTAL, REVENUES			7,110,876.38	7,791,881.12	9.6%
<b>CERTIFICATED SALARIES</b>					
Certificated Teachers' Salaries		1100	1,444,697.94	1,800,493.60	24.6%
Certificated Pupil Support Salaries		1200	116,980.82	188,708.39	61.3%
Certificated Supervisors' and Administrators' Salaries		1300	270,094.01	300,959.81	11.4%
Other Certificated Salaries		1900	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			1,831,772.77	2,290,161.80	25.0%
<b>CLASSIFIED SALARIES</b>					
Classified Instructional Salaries		2100	291,484.40	381,452.05	30.9%
Classified Support Salaries		2200	62,855.49	91,639.67	45.8%
Classified Supervisors' and Administrators' Salaries		2300	46,622.28	38,904.96	-16.6%
Clerical, Technical and Office Salaries		2400	431,861.72	512,466.15	18.7%

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Other Classified Salaries		2900	76,864.89	62,947.65	-18.1%
<b>TOTAL, CLASSIFIED SALARIES</b>			<b>909,688.78</b>	<b>1,087,410.48</b>	<b>19.5%</b>
<b>EMPLOYEE BENEFITS</b>					
STRS		3101-3102	347,632.76	437,420.90	25.8%
PERS		3201-3202	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	95,844.89	116,394.27	21.4%
Health and Welfare Benefits		3401-3402	372,802.37	435,077.83	16.7%
Unemployment Insurance		3501-3502	15,465.92	1,688.80	-89.1%
Workers' Compensation		3601-3602	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	14,567.60	10,874.11	-25.4%
<b>TOTAL, EMPLOYEE BENEFITS</b>			<b>846,313.54</b>	<b>1,001,455.91</b>	<b>18.3%</b>
<b>BOOKS AND SUPPLIES</b>					
Approved Textbooks and Core Curricula Materials		4100	72,339.75	77,856.25	7.6%
Books and Other Reference Materials		4200	18,500.00	18,500.00	0.0%
Materials and Supplies		4300	272,608.35	245,347.95	-10.0%
Noncapitalized Equipment		4400	150,500.00	150,500.00	0.0%
Food		4700	393,522.67	371,930.55	-5.5%
<b>TOTAL, BOOKS AND SUPPLIES</b>			<b>907,470.77</b>	<b>864,134.75</b>	<b>-4.8%</b>
<b>SERVICES AND OTHER OPERATING EXPENSES</b>					
Subagreements for Services		5100	0.00	0.00	0.0%
Travel and Conferences		5200	15,299.00	15,299.00	0.0%
Dues and Memberships		5300	8,407.90	10,933.40	30.0%
Insurance		5400-5450	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	226,954.00	192,954.00	-15.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	392,308.00	382,265.00	-2.6%
Transfers of Direct Costs		5710	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	1,570,198.96	1,660,596.10	5.8%
Communications		5900	91,188.47	81,276.92	-10.9%
<b>TOTAL, SERVICES AND OTHER OPERATING EXPENSES</b>			<b>2,304,356.33</b>	<b>2,343,324.42</b>	<b>1.7%</b>
<b>DEPRECIATION AND AMORTIZATION</b>					
Depreciation Expense		6900	87,056.85	80,246.06	-7.8%
Amortization Expense—Lease Assets		6910	0.00	0.00	0.0%
Amortization Expense—Subscription Assets		6920	0.00	0.00	0.0%
<b>TOTAL, DEPRECIATION AND AMORTIZATION</b>			<b>87,056.85</b>	<b>80,246.06</b>	<b>-7.8%</b>
<b>OTHER OUTGO (excluding Transfers of Indirect Costs)</b>					
Tuition					
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments					
Payments to Districts or Charter Schools		7141	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.0%
Other Transfers Out					
All Other Transfers		7281-7283	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.0%
Debt Service					
Debt Service - Interest		7438	0.00	0.00	0.0%
<b>TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>					
Transfers of Indirect Costs		7310	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.0%
<b>TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>TOTAL, EXPENSES</b>			<b>6,886,659.04</b>	<b>7,666,733.42</b>	<b>11.3%</b>
<b>INTERFUND TRANSFERS</b>					
<b>INTERFUND TRANSFERS IN</b>					
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.0%
<b>(a) TOTAL, INTERFUND TRANSFERS IN</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>INTERFUND TRANSFERS OUT</b>					
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.0%

Bert Corona Charter  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Expenses by Object

19 64733 0106872  
 Form 62  
 E8BHNZW97R(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.0%
<b>OTHER SOURCES/USES</b>					
<b>SOURCES</b>					
Other Sources					
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.0%
<b>USES</b>					
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.0%
<b>CONTRIBUTIONS</b>					
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.0%

Bert Corona Charter  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Function

19 64733 0106872  
Form 62  
E8BHNZW97R(2023-24)

Description	Function Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	4,015,999.81	4,585,887.54	14.2%
2) Federal Revenue		8100-8299	1,203,236.57	1,447,874.63	20.3%
3) Other State Revenue		8300-8599	1,337,986.45	1,331,900.06	-0.5%
4) Other Local Revenue		8600-8799	553,653.55	426,218.89	-23.0%
5) TOTAL, REVENUES			7,110,876.38	7,791,881.12	9.6%
<b>B. EXPENSES (Objects 1000-7999)</b>					
1) Instruction	1000-1999		2,951,692.47	3,490,892.18	18.3%
2) Instruction - Related Services	2000-2999		2,304,784.79	2,364,141.68	2.6%
3) Pupil Services	3000-3999		720,752.42	831,923.60	15.4%
4) Ancillary Services	4000-4999		13,500.00	13,500.00	0.0%
5) Community Services	5000-5999		0.00	0.00	0.0%
6) Enterprise	6000-6999		0.00	0.00	0.0%
7) General Administration	7000-7999		389,211.75	477,065.32	22.6%
8) Plant Services	8000-8999		506,717.61	489,210.64	-3.5%
9) Other Outgo	9000-9999	Except 7600-7699	0.00	0.00	0.0%
10) TOTAL, EXPENSES			6,886,659.04	7,666,733.42	11.3%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B10)</b>			224,217.34	125,147.70	-44.2%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			224,217.34	125,147.70	-44.2%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	3,050,477.87	3,466,680.21	13.6%
b) Audit Adjustments		9793	191,985.00	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			3,242,462.87	3,466,680.21	6.9%
d) Other Restatements		9795	0.00	209,258.50	New
e) Adjusted Beginning Net Position (F1c + F1d)			3,242,462.87	3,675,938.71	13.4%
2) Ending Net Position, June 30 (E + F1e)			3,466,680.21	3,801,086.41	9.6%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	239,860.16	209,258.50	-12.8%
b) Restricted Net Position		9797	192,466.96	217,013.16	12.8%
c) Unrestricted Net Position		9790	3,034,353.09	3,374,814.75	11.2%

Bert Corona Charter  
 Los Angeles Unified  
 Los Angeles County

**Budget, July 1**  
**Charter Schools Enterprise Fund**  
**Exhibit: Restricted Net Position Detail**

19 64733 0106872  
 Form 62  
 E8BHNZW97R(2023-24)

Resource	Description	2022-23	2023-24
		Estimated Actuals	Budget
5310	Child Nutrition: School Programs (e.g., School Lunch, School Breakfast, Milk, Pregnant & Lactating Students)	192,466.96	217,013.16
Total, Restricted Net Position		192,466.96	217,013.16

Bert Corona Charter High  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0132126  
Form 62  
E8BKCT1KDD(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	2,830,268.09	3,340,676.69	18.0%
2) Federal Revenue		8100-8299	909,735.53	566,076.59	-37.8%
3) Other State Revenue		8300-8599	304,590.19	788,120.86	158.7%
4) Other Local Revenue		8600-8799	262,279.47	246,789.97	-5.9%
5) TOTAL, REVENUES			4,306,873.28	4,941,664.11	14.7%
<b>B. EXPENSES</b>					
1) Certificated Salaries		1000-1999	1,475,752.91	1,634,020.29	10.7%
2) Classified Salaries		2000-2999	543,352.86	805,110.28	48.2%
3) Employee Benefits		3000-3999	660,323.91	805,747.33	22.0%
4) Books and Supplies		4000-4999	380,062.18	359,556.36	-5.4%
5) Services and Other Operating Expenses		5000-5999	1,176,748.07	1,241,917.30	5.5%
6) Depreciation and Amortization		6000-6999	43,726.79	39,111.39	-10.6%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	0.00	0.00	0.0%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.0%
9) TOTAL, EXPENSES			4,279,966.72	4,885,462.95	14.1%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)</b>			26,906.56	56,201.16	108.9%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			26,906.56	56,201.16	108.9%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	339,305.03	624,817.96	84.1%
b) Audit Adjustments		9793	258,606.37	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			597,911.40	624,817.96	4.5%
d) Other Restatements		9795	0.00	(18,317.84)	New
e) Adjusted Beginning Net Position (F1c + F1d)			597,911.40	606,500.12	1.4%
2) Ending Net Position, June 30 (E + F1e)			624,817.96	662,701.28	6.1%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	43,698.21	9,250.53	-78.8%
b) Restricted Net Position		9797	38,594.35	59,343.59	53.8%
c) Unrestricted Net Position		9790	542,525.40	594,107.16	9.5%
<b>G. ASSETS</b>					
1) Cash					
a) in County Treasury		9110	0.00		
1) Fair Value Adjustment to Cash in County Treasury		9111	0.00		
b) in Banks		9120	0.00		
c) in Revolving Cash Account		9130	0.00		
d) with Fiscal Agent/Trustee		9135	0.00		
e) Collections Awaiting Deposit		9140	0.00		
2) Investments		9150	0.00		
3) Accounts Receivable		9200	0.00		
4) Due from Grantor Government		9290	0.00		
5) Due from Other Funds		9310	0.00		
6) Stores		9320	0.00		
7) Prepaid Expenditures		9330	0.00		
8) Other Current Assets		9340	0.00		
9) Lease Receivable		9380	0.00		
10) Fixed Assets					
a) Land		9410	0.00		
b) Land Improvements		9420	0.00		
c) Accumulated Depreciation - Land Improvements		9425	0.00		
d) Buildings		9430	0.00		

Bert Corona Charter High  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0132126  
Form 62  
E8BKCT1KDD(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
e) Accumulated Depreciation - Buildings		9435	0.00		
f) Equipment		9440	0.00		
g) Accumulated Depreciation - Equipment		9445	0.00		
h) Work in Progress		9450	0.00		
i) Lease Assets		9460	0.00		
j) Accumulated Amortization-Lease Assets		9465	0.00		
k) Subscription Assets		9470	0.00		
l) Accumulated Amortization-Subscription Assets		9475	0.00		
11) TOTAL, ASSETS			0.00		
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>					
1) Deferred Outflows of Resources		9490	0.00		
2) TOTAL, DEFERRED OUTFLOWS			0.00		
<b>I. LIABILITIES</b>					
1) Accounts Payable		9500	0.00		
2) Due to Grantor Governments		9590	0.00		
3) Due to Other Funds		9610	0.00		
4) Current Loans		9640	0.00		
5) Unearned Revenue		9650	0.00		
6) Long-Term Liabilities					
a) Subscription Liability		9660	0.00		
b) Net Pension Liability		9663	0.00		
c) Total/Net OPEB Liability		9664	0.00		
d) Compensated Absences		9665	0.00		
e) COPs Payable		9666	0.00		
f) Leases Payable		9667	0.00		
g) Lease Revenue Bonds Payable		9668	0.00		
h) Other General Long-Term Liabilities		9669	0.00		
7) TOTAL, LIABILITIES			0.00		
<b>J. DEFERRED INFLOWS OF RESOURCES</b>					
1) Deferred Inflows of Resources		9690	0.00		
2) TOTAL, DEFERRED INFLOWS			0.00		
<b>K. NET POSITION</b>					
(G11 + H2) - (I7 + J2)			0.00		
<b>LCFF SOURCES</b>					
Principal Apportionment					
State Aid - Current Year		8011	2,224,391.87	2,650,636.86	19.2%
Education Protection Account State Aid - Current Year		8012	35,980.00	39,192.00	8.9%
State Aid - Prior Years		8019	0.00	0.00	0.0%
LCFF Transfers					
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	569,896.22	650,847.83	14.2%
Property Taxes Transfers		8097	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			2,830,268.09	3,340,676.69	18.0%
<b>FEDERAL REVENUE</b>					
Maintenance and Operations		8110	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	0.0%
Child Nutrition Programs		8220	134,003.51	135,128.08	0.8%
Donated Food Commodities		8221	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	44,007.14	47,935.74	8.9%
Title I, Part A, Basic	3010	8290	75,757.00	75,757.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	8,815.00	8,815.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	4,919.20	4,804.80	-2.3%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3150, 3155, 3180, 3182, 4037, 4124, 4126, 4127, 4128, 5630	8290	10,000.00	10,000.00	0.0%



Bert Corona Charter High  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0132126  
Form 62  
EBKCT1KDD(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Career and Technical Education	3500-3599	8290	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	632,233.68	283,635.97	-55.1%
<b>TOTAL, FEDERAL REVENUE</b>			<b>909,735.53</b>	<b>566,076.59</b>	<b>-37.8%</b>
<b>OTHER STATE REVENUE</b>					
Other State Apportionments					
Special Education Master Plan					
Current Year	6500	8311	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.0%
Child Nutrition Programs		8520	53,203.02	47,079.62	-11.5%
Mandated Costs Reimbursements		8550	8,476.00	9,958.29	17.5%
Lottery - Unrestricted and Instructional Materials		8560	42,776.13	46,442.52	8.6%
After School Education and Safety (ASES)	6010	8590	0.00	0.00	0.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.0%
Specialized Secondary	7370	8590	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	200,135.04	684,640.43	242.1%
<b>TOTAL, OTHER STATE REVENUE</b>			<b>304,590.19</b>	<b>788,120.86</b>	<b>158.7%</b>
<b>OTHER LOCAL REVENUE</b>					
Sales					
Sale of Equipment/Supplies		8631	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.0%
Interest		8660	0.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.0%
Fees and Contracts					
Child Development Parent Fees		8673	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.0%
Interagency Services		8677	223,472.04	216,789.97	-3.0%
All Other Fees and Contracts		8689	0.00	0.00	0.0%
All Other Local Revenue		8699	38,807.43	30,000.00	-22.7%
Tuition		8710	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.0%
Transfers of Apportionments					
Special Education SELPA Transfers					
From Districts or Charter Schools	6500	8791	0.00	0.00	0.0%
From County Offices	6500	8792	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.0%
Other Transfers of Apportionments					
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.0%
<b>TOTAL, OTHER LOCAL REVENUE</b>			<b>262,279.47</b>	<b>246,789.97</b>	<b>-5.9%</b>
<b>TOTAL, REVENUES</b>			<b>4,306,873.28</b>	<b>4,941,664.11</b>	<b>14.7%</b>
<b>CERTIFICATED SALARIES</b>					
Certificated Teachers' Salaries		1100	1,227,589.45	1,327,299.73	8.1%
Certificated Pupil Support Salaries		1200	150,074.91	170,021.33	13.3%
Certificated Supervisors' and Administrators' Salaries		1300	98,088.55	136,699.23	39.4%
Other Certificated Salaries		1900	0.00	0.00	0.0%
<b>TOTAL, CERTIFICATED SALARIES</b>			<b>1,475,752.91</b>	<b>1,634,020.29</b>	<b>10.7%</b>
<b>CLASSIFIED SALARIES</b>					
Classified Instructional Salaries		2100	101,934.84	259,095.20	154.2%
Classified Support Salaries		2200	0.00	19,541.50	New
Classified Supervisors' and Administrators' Salaries		2300	134,018.67	136,806.08	2.1%
Clerical, Technical and Office Salaries		2400	256,596.29	342,371.81	33.4%

Bert Corona Charter High  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0132126  
Form 62  
EBKCT1KDD(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Other Classified Salaries		2900	50,803.06	47,295.69	-6.9%
<b>TOTAL, CLASSIFIED SALARIES</b>			<b>543,352.86</b>	<b>805,110.28</b>	<b>48.2%</b>
<b>EMPLOYEE BENEFITS</b>					
STRS		3101-3102	273,664.75	312,097.88	14.0%
PERS		3201-3202	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	63,170.88	85,284.22	35.0%
Health and Welfare Benefits		3401-3402	305,552.57	399,094.57	30.6%
Unemployment Insurance		3501-3502	11,122.97	1,219.56	-89.0%
Workers' Compensation		3601-3602	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	6,812.74	8,051.10	18.2%
<b>TOTAL, EMPLOYEE BENEFITS</b>			<b>660,323.91</b>	<b>805,747.33</b>	<b>22.0%</b>
<b>BOOKS AND SUPPLIES</b>					
Approved Textbooks and Core Curricula Materials		4100	49,800.00	55,900.00	12.2%
Books and Other Reference Materials		4200	10,500.00	10,500.00	0.0%
Materials and Supplies		4300	104,400.00	93,572.00	-10.4%
Noncapitalized Equipment		4400	66,750.00	62,750.00	-6.0%
Food		4700	148,612.18	136,834.36	-7.9%
<b>TOTAL, BOOKS AND SUPPLIES</b>			<b>380,062.18</b>	<b>359,556.36</b>	<b>-5.4%</b>
<b>SERVICES AND OTHER OPERATING EXPENSES</b>					
Subagreements for Services		5100	0.00	0.00	0.0%
Travel and Conferences		5200	5,549.00	5,549.00	0.0%
Dues and Memberships		5300	8,571.29	8,571.29	0.0%
Insurance		5400-5450	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	2,580.30	3,200.00	24.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	195,914.94	244,700.00	24.9%
Transfers of Direct Costs		5710	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	932,914.56	949,162.10	1.7%
Communications		5900	31,217.98	30,734.91	-1.5%
<b>TOTAL, SERVICES AND OTHER OPERATING EXPENSES</b>			<b>1,176,748.07</b>	<b>1,241,917.30</b>	<b>5.5%</b>
<b>DEPRECIATION AND AMORTIZATION</b>					
Depreciation Expense		6900	43,726.79	39,111.39	-10.6%
Amortization Expense—Lease Assets		6910	0.00	0.00	0.0%
Amortization Expense—Subscription Assets		6920	0.00	0.00	0.0%
<b>TOTAL, DEPRECIATION AND AMORTIZATION</b>			<b>43,726.79</b>	<b>39,111.39</b>	<b>-10.6%</b>
<b>OTHER OUTGO (excluding Transfers of Indirect Costs)</b>					
Tuition					
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments					
Payments to Districts or Charter Schools		7141	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.0%
Other Transfers Out					
All Other Transfers		7281-7283	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.0%
Debt Service					
Debt Service - Interest		7438	0.00	0.00	0.0%
<b>TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>					
Transfers of Indirect Costs		7310	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.0%
<b>TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>TOTAL, EXPENSES</b>			<b>4,279,966.72</b>	<b>4,885,462.95</b>	<b>14.1%</b>
<b>INTERFUND TRANSFERS</b>					
<b>INTERFUND TRANSFERS IN</b>					
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.0%
<b>(a) TOTAL, INTERFUND TRANSFERS IN</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>INTERFUND TRANSFERS OUT</b>					
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.0%

Bert Corona Charter High  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Expenses by Object

19 64733 0132126  
 Form 62  
 E8BKCT1KDD(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.0%
<b>OTHER SOURCES/USES</b>					
<b>SOURCES</b>					
Other Sources					
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.0%
<b>USES</b>					
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.0%
<b>CONTRIBUTIONS</b>					
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.0%

Bert Corona Charter High  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Expenses by Function

19 64733 0132126  
 Form 62  
 E8BKCT1KDD(2023-24)

Description	Function Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	2,830,268.09	3,340,676.69	18.0%
2) Federal Revenue		8100-8299	909,735.53	566,076.59	-37.8%
3) Other State Revenue		8300-8599	304,590.19	788,120.86	158.7%
4) Other Local Revenue		8600-8799	262,279.47	246,789.97	-5.9%
5) TOTAL, REVENUES			4,306,873.28	4,941,664.11	14.7%
<b>B. EXPENSES (Objects 1000-7999)</b>					
1) Instruction	1000-1999		2,111,857.12	2,464,630.96	16.7%
2) Instruction - Related Services	2000-2999		1,335,145.91	1,419,826.38	6.3%
3) Pupil Services	3000-3999		417,286.55	466,542.19	11.8%
4) Ancillary Services	4000-4999		7,500.00	2,500.00	-66.7%
5) Community Services	5000-5999		0.00	0.00	0.0%
6) Enterprise	6000-6999		0.00	0.00	0.0%
7) General Administration	7000-7999		214,472.54	291,443.90	35.9%
8) Plant Services	8000-8999		193,704.60	240,519.52	24.2%
9) Other Outgo	9000-9999	Except 7600-7699	0.00	0.00	0.0%
10) TOTAL, EXPENSES			4,279,966.72	4,885,462.95	14.1%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B10)</b>			26,906.56	56,201.16	108.9%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			26,906.56	56,201.16	108.9%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	339,305.03	624,817.96	84.1%
b) Audit Adjustments		9793	258,606.37	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			597,911.40	624,817.96	4.5%
d) Other Restatements		9795	0.00	(18,317.84)	New
e) Adjusted Beginning Net Position (F1c + F1d)			597,911.40	606,500.12	1.4%
2) Ending Net Position, June 30 (E + F1e)			624,817.96	662,701.28	6.1%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	43,698.21	9,250.53	-78.8%
b) Restricted Net Position		9797	38,594.35	59,343.59	53.8%
c) Unrestricted Net Position		9790	542,525.40	594,107.16	9.5%

Bert Corona Charter High  
 Los Angeles Unified  
 Los Angeles County

**Budget, July 1**  
**Charter Schools Enterprise Fund**  
**Exhibit: Restricted Net Position Detail**

19 64733 0132126  
 Form 62  
 E8BKCT1KDD(2023-24)

Resource	Description	2022-23	2023-24
		Estimated Actuals	Budget
5310	Child Nutrition: School Programs (e.g., School Lunch, School Breakfast, Milk, Pregnant & Lactating Students)	38,594.35	59,343.59
Total, Restricted Net Position		38,594.35	59,343.59

Monsenor Oscar Romero Charter Middle  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0114959  
Form 62  
E8BXDH7NSZ(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	3,368,523.85	4,022,475.61	19.4%
2) Federal Revenue		8100-8299	1,274,825.73	1,552,032.46	21.7%
3) Other State Revenue		8300-8599	1,674,629.59	911,076.72	-45.6%
4) Other Local Revenue		8600-8799	356,772.38	265,469.20	-25.6%
5) TOTAL, REVENUES			6,674,751.55	6,751,053.99	1.1%
<b>B. EXPENSES</b>					
1) Certificated Salaries		1000-1999	1,761,399.10	2,222,794.05	26.2%
2) Classified Salaries		2000-2999	805,630.57	903,811.36	12.2%
3) Employee Benefits		3000-3999	756,413.67	830,995.50	9.9%
4) Books and Supplies		4000-4999	679,153.96	653,272.26	-3.8%
5) Services and Other Operating Expenses		5000-5999	1,923,805.74	1,817,346.48	-5.5%
6) Depreciation and Amortization		6000-6999	800,225.91	781,036.97	-2.4%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	160,218.80	145,164.54	-9.4%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.0%
9) TOTAL, EXPENSES			6,886,847.75	7,354,421.16	6.8%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)</b>			(212,096.20)	(603,367.17)	184.5%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			(212,096.20)	(603,367.17)	184.5%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	22,056,421.30	21,956,853.10	-0.5%
b) Audit Adjustments		9793	112,528.00	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			22,168,949.30	21,956,853.10	-1.0%
d) Other Restatements		9795	0.00	(38,527.48)	New
e) Adjusted Beginning Net Position (F1c + F1d)			22,168,949.30	21,918,325.62	-1.1%
2) Ending Net Position, June 30 (E + F1e)			21,956,853.10	21,314,958.45	-2.9%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	18,692,323.42	18,151,857.49	-2.9%
b) Restricted Net Position		9797	152,110.55	201,414.07	32.4%
c) Unrestricted Net Position		9790	3,112,419.13	2,961,686.89	-4.8%
<b>G. ASSETS</b>					
1) Cash					
a) in County Treasury		9110	0.00		
1) Fair Value Adjustment to Cash in County Treasury		9111	0.00		
b) in Banks		9120	0.00		
c) in Revolving Cash Account		9130	0.00		
d) with Fiscal Agent/Trustee		9135	0.00		
e) Collections Awaiting Deposit		9140	0.00		
2) Investments		9150	0.00		
3) Accounts Receivable		9200	0.00		
4) Due from Grantor Government		9290	0.00		
5) Due from Other Funds		9310	0.00		
6) Stores		9320	0.00		
7) Prepaid Expenditures		9330	0.00		
8) Other Current Assets		9340	0.00		
9) Lease Receivable		9380	0.00		
10) Fixed Assets					
a) Land		9410	0.00		
b) Land Improvements		9420	0.00		
c) Accumulated Depreciation - Land Improvements		9425	0.00		
d) Buildings		9430	0.00		

Monsenor Oscar Romero Charter Middle  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0114959  
Form 62  
E8BXDH7NSZ(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
e) Accumulated Depreciation - Buildings		9435	0.00		
f) Equipment		9440	0.00		
g) Accumulated Depreciation - Equipment		9445	0.00		
h) Work in Progress		9450	0.00		
i) Lease Assets		9460	0.00		
j) Accumulated Amortization-Lease Assets		9465	0.00		
k) Subscription Assets		9470	0.00		
l) Accumulated Amortization-Subscription Assets		9475	0.00		
11) TOTAL, ASSETS			0.00		
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>					
1) Deferred Outflows of Resources		9490	0.00		
2) TOTAL, DEFERRED OUTFLOWS			0.00		
<b>I. LIABILITIES</b>					
1) Accounts Payable		9500	0.00		
2) Due to Grantor Governments		9590	0.00		
3) Due to Other Funds		9610	0.00		
4) Current Loans		9640	0.00		
5) Unearned Revenue		9650	0.00		
6) Long-Term Liabilities					
a) Subscription Liability		9660	0.00		
b) Net Pension Liability		9663	0.00		
c) Total/Net OPEB Liability		9664	0.00		
d) Compensated Absences		9665	0.00		
e) COPs Payable		9666	0.00		
f) Leases Payable		9667	0.00		
g) Lease Revenue Bonds Payable		9668	0.00		
h) Other General Long-Term Liabilities		9669	0.00		
7) TOTAL, LIABILITIES			0.00		
<b>J. DEFERRED INFLOWS OF RESOURCES</b>					
1) Deferred Inflows of Resources		9690	0.00		
2) TOTAL, DEFERRED INFLOWS			0.00		
<b>K. NET POSITION</b>					
(G11 + H2) - (I7 + J2)			0.00		
<b>LCFF SOURCES</b>					
Principal Apportionment					
State Aid - Current Year		8011	1,988,963.25	2,415,670.02	21.5%
Education Protection Account State Aid - Current Year		8012	570,079.89	673,312.58	18.1%
State Aid - Prior Years		8019	0.00	0.00	0.0%
LCFF Transfers					
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	809,480.71	933,493.01	15.3%
Property Taxes Transfers		8097	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			3,368,523.85	4,022,475.61	19.4%
<b>FEDERAL REVENUE</b>					
Maintenance and Operations		8110	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	0.0%
Child Nutrition Programs		8220	285,508.57	286,368.50	0.3%
Donated Food Commodities		8221	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	62,507.75	34,625.00	-44.6%
Title I, Part A, Basic	3010	8290	147,967.00	147,967.00	0.0%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	16,715.00	16,715.00	0.0%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	13,499.20	12,584.00	-6.8%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3060, 3061, 3150, 3155, 3180, 3182, 4037, 4124, 4126, 4127, 4128, 5630	8290	11,151.00	11,151.00	0.0%

Monsenor Oscar Romero Charter Middle  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0114959  
Form 62  
E8BXDH7NSZ(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Career and Technical Education	3500-3599	8290	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	737,477.21	1,042,621.96	41.4%
<b>TOTAL, FEDERAL REVENUE</b>			<b>1,274,825.73</b>	<b>1,552,032.46</b>	<b>21.7%</b>
<b>OTHER STATE REVENUE</b>					
Other State Apportionments					
Special Education Master Plan					
Current Year	6500	8311	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.0%
Child Nutrition Programs		8520	105,216.29	108,529.93	3.1%
Mandated Costs Reimbursements		8550	5,029.00	5,051.40	0.4%
Lottery - Unrestricted and Instructional Materials		8560	60,778.65	66,611.22	9.6%
After School Education and Safety (ASES)	6010	8590	203,483.00	227,878.76	12.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.0%
Specialized Secondary	7370	8590	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	1,300,122.65	503,005.41	-61.3%
<b>TOTAL, OTHER STATE REVENUE</b>			<b>1,674,629.59</b>	<b>911,076.72</b>	<b>-45.6%</b>
<b>OTHER LOCAL REVENUE</b>					
Sales					
Sale of Equipment/Supplies		8631	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.0%
Interest		8660	0.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.0%
Fees and Contracts					
Child Development Parent Fees		8673	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.0%
Interagency Services		8677	306,472.38	245,469.20	-19.9%
All Other Fees and Contracts		8689	0.00	0.00	0.0%
All Other Local Revenue		8699	50,300.00	20,000.00	-60.2%
Tuition		8710	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.0%
Transfers of Apportionments					
Special Education SELPA Transfers					
From Districts or Charter Schools	6500	8791	0.00	0.00	0.0%
From County Offices	6500	8792	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.0%
Other Transfers of Apportionments					
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.0%
<b>TOTAL, OTHER LOCAL REVENUE</b>			<b>356,772.38</b>	<b>265,469.20</b>	<b>-25.6%</b>
<b>TOTAL, REVENUES</b>			<b>6,674,751.55</b>	<b>6,751,053.99</b>	<b>1.1%</b>
<b>CERTIFICATED SALARIES</b>					
Certificated Teachers' Salaries		1100	1,495,663.80	1,888,960.45	26.3%
Certificated Pupil Support Salaries		1200	78,086.09	155,258.33	98.8%
Certificated Supervisors' and Administrators' Salaries		1300	187,649.21	178,575.27	-4.8%
Other Certificated Salaries		1900	0.00	0.00	0.0%
<b>TOTAL, CERTIFICATED SALARIES</b>			<b>1,761,399.10</b>	<b>2,222,794.05</b>	<b>26.2%</b>
<b>CLASSIFIED SALARIES</b>					
Classified Instructional Salaries		2100	188,667.87	234,779.26	24.4%
Classified Support Salaries		2200	82,706.05	88,419.85	6.9%
Classified Supervisors' and Administrators' Salaries		2300	56,753.30	34,305.01	-39.6%
Clerical, Technical and Office Salaries		2400	414,735.73	509,044.54	22.7%



Monsenor Oscar Romero Charter Middle  
Los Angeles Unified  
Los Angeles County

Budget, July 1  
Charter Schools Enterprise Fund  
Expenses by Object

19 64733 0114959  
Form 62  
E8BXDH7NSZ(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
Other Classified Salaries		2900	62,767.62	37,262.70	-40.6%
<b>TOTAL, CLASSIFIED SALARIES</b>			<b>805,630.57</b>	<b>903,811.36</b>	<b>12.2%</b>
<b>EMPLOYEE BENEFITS</b>					
STRS		3101-3102	320,288.33	424,553.65	32.6%
PERS		3201-3202	0.00	0.00	0.0%
OASDI/Medicare/Alternative		3301-3302	87,932.12	101,372.09	15.3%
Health and Welfare Benefits		3401-3402	323,380.88	295,372.15	-8.7%
Unemployment Insurance		3501-3502	14,615.94	1,563.31	-89.3%
Workers' Compensation		3601-3602	0.00	0.00	0.0%
OPEB, Allocated		3701-3702	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	10,196.40	8,134.30	-20.2%
<b>TOTAL, EMPLOYEE BENEFITS</b>			<b>756,413.67</b>	<b>830,995.50</b>	<b>9.9%</b>
<b>BOOKS AND SUPPLIES</b>					
Approved Textbooks and Core Curricula Materials		4100	60,353.83	45,353.83	-24.9%
Books and Other Reference Materials		4200	10,000.00	10,000.00	0.0%
Materials and Supplies		4300	174,853.15	174,352.02	-0.3%
Noncapitalized Equipment		4400	133,800.00	127,300.00	-4.9%
Food		4700	300,146.98	296,266.41	-1.3%
<b>TOTAL, BOOKS AND SUPPLIES</b>			<b>679,153.96</b>	<b>653,272.26</b>	<b>-3.8%</b>
<b>SERVICES AND OTHER OPERATING EXPENSES</b>					
Subagreements for Services		5100	0.00	0.00	0.0%
Travel and Conferences		5200	22,493.77	17,099.00	-24.0%
Dues and Memberships		5300	5,682.90	6,804.90	19.7%
Insurance		5400-5450	0.00	0.00	0.0%
Operations and Housekeeping Services		5500	435,840.00	235,840.00	-45.9%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	52,979.85	55,207.73	4.2%
Transfers of Direct Costs		5710	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	1,343,349.54	1,435,788.00	6.9%
Communications		5900	63,459.68	66,606.85	5.0%
<b>TOTAL, SERVICES AND OTHER OPERATING EXPENSES</b>			<b>1,923,805.74</b>	<b>1,817,346.48</b>	<b>-5.5%</b>
<b>DEPRECIATION AND AMORTIZATION</b>					
Depreciation Expense		6900	800,225.91	781,036.97	-2.4%
Amortization Expense—Lease Assets		6910	0.00	0.00	0.0%
Amortization Expense—Subscription Assets		6920	0.00	0.00	0.0%
<b>TOTAL, DEPRECIATION AND AMORTIZATION</b>			<b>800,225.91</b>	<b>781,036.97</b>	<b>-2.4%</b>
<b>OTHER OUTGO (excluding Transfers of Indirect Costs)</b>					
Tuition					
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments					
Payments to Districts or Charter Schools		7141	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.0%
Other Transfers Out					
All Other Transfers		7281-7283	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.0%
Debt Service					
Debt Service - Interest		7438	160,218.80	145,164.54	-9.4%
<b>TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)</b>			<b>160,218.80</b>	<b>145,164.54</b>	<b>-9.4%</b>
<b>OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>					
Transfers of Indirect Costs		7310	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.0%
<b>TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>TOTAL, EXPENSES</b>			<b>6,886,847.75</b>	<b>7,354,421.16</b>	<b>6.8%</b>
<b>INTERFUND TRANSFERS</b>					
<b>INTERFUND TRANSFERS IN</b>					
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.0%
<b>(a) TOTAL, INTERFUND TRANSFERS IN</b>			<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>
<b>INTERFUND TRANSFERS OUT</b>					
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.0%

Monsenor Oscar Romero Charter Middle  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Expenses by Object

19 64733 0114959  
 Form 62  
 E8BXDH7NSZ(2023-24)

Description	Resource Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.0%
<b>OTHER SOURCES/USES</b>					
<b>SOURCES</b>					
Other Sources					
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.0%
<b>USES</b>					
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.0%
<b>CONTRIBUTIONS</b>					
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.0%

Monsenor Oscar Romero Charter Middle  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Expenses by Function

19 64733 0114959  
 Form 62  
 E8BXDH7NSZ(2023-24)

Description	Function Codes	Object Codes	2022-23 Estimated Actuals	2023-24 Budget	Percent Difference
<b>A. REVENUES</b>					
1) LCFF Sources		8010-8099	3,368,523.85	4,022,475.61	19.4%
2) Federal Revenue		8100-8299	1,274,825.73	1,552,032.46	21.7%
3) Other State Revenue		8300-8599	1,674,629.59	911,076.72	-45.6%
4) Other Local Revenue		8600-8799	356,772.38	265,469.20	-25.6%
5) TOTAL, REVENUES			6,674,751.55	6,751,053.99	1.1%
<b>B. EXPENSES (Objects 1000-7999)</b>					
1) Instruction	1000-1999		2,730,416.60	3,341,875.74	22.4%
2) Instruction - Related Services	2000-2999		1,837,700.52	1,765,308.86	-3.9%
3) Pupil Services	3000-3999		558,923.38	654,810.45	17.2%
4) Ancillary Services	4000-4999		6,400.00	6,400.00	0.0%
5) Community Services	5000-5999		0.00	0.00	0.0%
6) Enterprise	6000-6999		0.00	0.00	0.0%
7) General Administration	7000-7999		331,087.85	400,516.75	21.0%
8) Plant Services	8000-8999		1,262,100.60	1,040,344.82	-17.6%
9) Other Outgo	9000-9999	Except 7600-7699	160,218.80	145,164.54	-9.4%
10) TOTAL, EXPENSES			6,886,847.75	7,354,421.16	6.8%
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B10)</b>			(212,096.20)	(603,367.17)	184.5%
<b>D. OTHER FINANCING SOURCES/USES</b>					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
<b>E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)</b>			(212,096.20)	(603,367.17)	184.5%
<b>F. NET POSITION</b>					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	22,056,421.30	21,956,853.10	-0.5%
b) Audit Adjustments		9793	112,528.00	0.00	-100.0%
c) As of July 1 - Audited (F1a + F1b)			22,168,949.30	21,956,853.10	-1.0%
d) Other Restatements		9795	0.00	(38,527.48)	New
e) Adjusted Beginning Net Position (F1c + F1d)			22,168,949.30	21,918,325.62	-1.1%
2) Ending Net Position, June 30 (E + F1e)			21,956,853.10	21,314,958.45	-2.9%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	18,692,323.42	18,151,857.49	-2.9%
b) Restricted Net Position		9797	152,110.55	201,414.07	32.4%
c) Unrestricted Net Position		9790	3,112,419.13	2,961,686.89	-4.8%

Monsenor Oscar Romero Charter Middle  
 Los Angeles Unified  
 Los Angeles County

Budget, July 1  
 Charter Schools Enterprise Fund  
 Exhibit: Restricted Net Position Detail

19 64733 0114959  
 Form 62  
 E8BXDH7NSZ(2023-24)

Resource	Description	2022-23	
		Estimated Actuals	2023-24 Budget
5310	Child Nutrition: School Programs (e.g., School Lunch, School Breakfast, Milk, Pregnant & Lactating Students)	152,110.55	201,414.07
Total, Restricted Net Position		152,110.55	201,414.07

# Coversheet

## Recommendation to approve the YPICS Budgets for 2023-2024

**Section:** V. Items Scheduled For Action  
**Item:** F. Recommendation to approve the YPICS Budgets for 2023-2024  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
FY23-24 Budget YPICS.pdf  
FY23-24 Budget Detail BCCS.pdf  
FY23-24 Budget Detail MORCS.pdf  
FY23-24 Budget Detail BCCHS.pdf  
6. Recommendation to approve 2023-2024 budgets for Bert Corona Charter School, Bert Corona C  
harter High School, and Monseñor Oscar Romero Charter School..pdf



# FY 2023/24 Budget

YPI Charter Schools Finance Committee Meeting, June 26, 2023



# Revenue Assumptions

- FY23-24 - COLA 8.22%
- Prop 28 Arts and Music Education Funding
  - BCCS \$58,785
  - MORCS \$49,600
  - BCHS \$36,185
- Arts, Music, and Instructional Materials Discretionary Block Grant – a proposed cut of approximately 51%
- Learning Recovery Emergency Block Grant – a proposed cut of approximately 32%
- SB740 assumes 50% funding reduction for Other Costs and 0% reduction to Rent Reimbursement
- Community Schools Planning Grants - \$250K for each school

# Effect of the Cuts to the State One Time Funds

<b>BCCS</b>			
2022-23 One-Time Grants	Original CDE Entitlement	May Revise Proposal	Variance
Learning Recovery Emergency Block Grant	\$ 631,056	\$ 429,118	\$ 201,938
Arts, Music, and Instructional Materials Discretionary Block Grant	\$ 206,990	\$ 101,425	\$ 105,565
<b>Total</b>	<b>\$ 838,046</b>	<b>\$ 530,543</b>	<b>\$ 307,503</b>

<b>MORCS</b>			
2022-23 One-Time Grants	Original CDE Entitlement	May Revise Proposal	Variance
Learning Recovery Emergency Block Grant	\$ 627,846	\$ 426,935	\$ 200,911
Arts, Music, and Instructional Materials Discretionary Block Grant	\$ 182,638	\$ 89,493	\$ 93,145
<b>Total</b>	<b>\$ 810,484</b>	<b>\$ 516,428</b>	<b>\$ 294,056</b>

<b>BCHS</b>			
2022-23 One-Time Grants	Original CDE Entitlement	May Revise Proposal	Variance
Learning Recovery Emergency Block Grant	\$ 364,899	\$ 248,131	\$ 116,768
Arts, Music, and Instructional Materials Discretionary Block Grant	\$ 110,742	\$ 54,264	\$ 56,478
<b>Total</b>	<b>\$ 475,641</b>	<b>\$ 302,395</b>	<b>\$ 173,246</b>

Funds were projected to be expended in the 23-24 to 25-26 budgets



# 2023-24 Legislative State Budget Announced

On Monday, June 12, 2023, Senate President pro Tempore Toni Atkins and Assembly Speaker Anthony Rendon announced that the Legislature had agreed to a 2023-24 State Budget.

- **Cost-of-Living Adjustment (COLA):** Approves the 8.22 percent COLA for the Local Control Funding Formula and affected categorical programs.
- **One-Time Block Grant Cuts Restored:** Significantly restores the proposed reduction the Arts, Music, and Instructional Materials Discretionary Block Grant, so that the total proposed \$1.8B reduction is now \$200M, and restores the K-12 Learning Recovery Emergency Block Grant from the proposed \$2.5B reduction to a \$494.5M reduction.

It is important to note that this *is not* the final State Budget, as Governor Gavin Newsom has not agreed to this spending plan.

# Revenue Assumptions

## Enrollment / ADA

- BCCS – 346 / 325.24 or 94%
- MORCS – 299 / 281.06 or 94%
- High School – 213 / 195.96 or 92%

## Unduplicated Count 3 Year Average

- BCCS – 86.66%
- MORCS – 95.87%
- High School – 90.73%
- LAUSD – 86%

# Expense Assumptions

- Updated Teacher Salary Scale
- Salary Increase – an average of 8% for salary staff and \$0.70 an hour for hourly staff
- Bonus – an average of 5%
- STRS 19.1%
- 8.9% Increase in Health Insurance costs
- Additional Staff

# Expense Assumptions

## Additional Staff

- BCCS
  - CA Partnerships Grant
    - School Psychologist
    - Mentor/Case Manager
  - Meal Server (part-time)
  - PBIS Coordinator
- MORCS
  - CA Partnerships Grant
    - School Psychologist
    - Mentor/Case Manager
- BCHS
  - CA Partnerships Grant
    - School Psychologist
    - Mentor/Case Manager
- LSC
  - CAO

<b>23-34 School Site Staffing Summary</b>				
<b>Positions</b>	<b>HS</b>	<b>BC</b>	<b>OR</b>	<b>LSC</b>
Executive	1	1	1	2
Administrative Support	4	3	4	4
Counseling Staff/School Psychologist	1	1	1	1
Community Schools (Grant)	2	2	2	2
Special Education	0	0	0	1
<b>Administrative Support</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>10</b>
Core Content Teachers	9	14	13	0
Reading/EL/CTE Specialist	1	1	2	0
Speical Education Teachers	2	3	2	0
Substitute	0	0	1	0
Behavior Intervention Implementation Tutors	5	3	1	0
Special Education Tutor	1	3	2	0
General Education tutor	0	2	3	0
<b>Academic Support</b>	<b>18</b>	<b>26</b>	<b>24</b>	<b>0</b>
Office Support	2	4	3	3
Tech Support	0	0	0	3
Custodial Support	0	2	1	0
Meal Program Support	1	1	1	0
<b>Operational Support</b>	<b>3</b>	<b>7</b>	<b>5</b>	<b>6</b>
Supervision	1	3	2	0
Culture and Climate Support	0	3	1	0
<b>Culture and Climate Support</b>	<b>1</b>	<b>6</b>	<b>3</b>	<b>0</b>
<b>Total Staff</b>	<b>30</b>	<b>46</b>	<b>40</b>	<b>16</b>

# Expense Assumptions

## Rent

- BCCS (\$167,945)
- No M&O costs for MORCS. \$100K budgeted for repairs.
- Prop 39 for High School (\$220K)
- LSC (\$54K)

MORCS Prop 1D repayment loan

LCS Cost – allocated based on the number of students.

# Expense Assumptions

## ExED contracts:

- Management and Accounting Services :
  - FY22-23 \$250,000 – (6% increase)
- CALPADS:
  - \$13,300 per school (\$1000 increase per school from FY22-23)

# Cost reductions for future years

- Support positions
- Field Trips
- Student/Office Supplies
- Vendor repairs
- Schola
- Hot Spots



# Central Admin – Summary Budget

## YPI CHARTER SCHOOLS, INC - CENTRAL ADMIN

### Multi-Year Budget Summary

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	2022-23	2023-24 Forecast	2024-25	2025-26	2026-27	2027-28
Total Enrollment	-	-	-	-	-	-
ADA	-	-	-	-	-	-
% Free and Reduced	0%	0%	0%	0%	0%	0%
% English Language Learners	0%	0%	0%	0%	0%	0%
% Unduplicated Low Income, EL, Foster Youth	0%	0%	0%	0%	0%	0%
<b>INCOME</b>						
8011-8098 · Local Control Funding Formula Sources	-	-	-	-	-	-
8100-8299 · Federal Revenue	-	-	-	-	-	-
8300-8599 · Other State Revenue	-	-	-	-	-	-
8600-8799 · Other Local Revenue	3,588	-	-	-	-	-
Grants/Fundraising	-	-	-	-	-	-
8999 · Other Prior Year Adjustment	-	-	-	-	-	-
<b>TOTAL INCOME</b>	<b>3,588</b>	-	-	-	-	-
<b>EXPENSE</b>						
1000 · Certificated Salaries	412,654	468,399	487,135	506,621	526,885	547,961
2000 · Classified Salaries	311,636	316,635	329,301	342,473	356,171	370,418
3000 · Employee Benefits	335,890	304,590	323,874	341,957	363,930	387,454
4000 · Supplies	9,408	9,690	10,033	10,365	10,700	11,021
5000 · Operating Services	(1,067,152)	(1,099,825)	(1,150,580)	(1,201,593)	(1,257,687)	(1,316,854)
6000 · Capital Outlay	1,151	511	237	178	-	-
7000 · Other Outgo	-	(0)	(0)	-	(0)	(0)
<b>TOTAL EXPENSE</b>	<b>3,588</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>
<b>NET INCOME</b>	<b>(0)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

# BCCS – Summary Budget

## BERT CORONA CHARTER SCHOOL

### Multi-Year Budget Summary

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	2022-23	2023-24 Forecast	2024-25	2025-26	2026-27	2027-28
Total Enrollment	333	346	355	375	375	375
ADA	307.25	325.24	337.25	356.25	358.13	358.13
% Free and Reduced	83%	83%	83%	83%	83%	83%
% English Language Learners	32%	32%	32%	32%	32%	32%
% Unduplicated Low Income, EL, Foster Youth	88%	88%	88%	88%	88%	88%
<b>INCOME</b>						
8011-8098 · Local Control Funding Formula Sources	3,999,211	4,585,888	4,950,059	5,404,399	5,606,500	5,719,046
8100-8299 · Federal Revenue	1,025,014	1,447,875	718,458	640,038	641,237	641,237
8300-8599 · Other State Revenue	1,469,431	1,331,900	1,951,982	1,282,279	1,301,174	1,232,226
8600-8799 · Other Local Revenue	500,716	400,719	402,473	421,069	422,904	422,904
Grants/Fundraising	50,750	25,500	25,500	25,500	25,500	25,500
8999 · Other Prior Year Adjustment	14,079	-	-	-	-	-
<b>TOTAL INCOME</b>	<b>7,059,201</b>	<b>7,791,881</b>	<b>8,048,472</b>	<b>7,773,286</b>	<b>7,997,316</b>	<b>8,040,913</b>
<b>EXPENSE</b>						
1000 · Certificated Salaries	1,863,682	2,290,162	2,381,768	2,477,039	2,551,350	2,627,891
2000 · Classified Salaries	914,973	1,087,410	1,130,907	1,063,672	1,095,582	1,066,395
3000 · Employee Benefits	857,517	1,001,456	1,058,917	1,093,698	1,136,327	1,166,000
4000 · Supplies	912,888	864,135	877,497	881,752	894,560	906,937
5000 · Operating Services	2,362,257	2,343,324	2,390,644	2,210,571	2,257,173	2,260,409
6000 · Capital Outlay	87,626	80,246	49,766	40,416	26,783	6,396
7000 · Other Outgo	-	-	-	-	-	-
<b>TOTAL EXPENSE</b>	<b>6,998,941</b>	<b>7,666,733</b>	<b>7,889,499</b>	<b>7,767,147</b>	<b>7,961,775</b>	<b>8,034,027</b>
<b>NET INCOME</b>	<b>60,259</b>	<b>125,148</b>	<b>158,974</b>	<b>6,138</b>	<b>35,541</b>	<b>6,886</b>
Ending Cash Balance	3,036,162	1,786,152	2,071,104	2,149,054	2,184,024	2,161,440

# MORCS– Summary Budget

## MONSEÑOR OSCAR ROMERO CHARTER SCHOOL

### Multi-Year Budget Summary

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	2022-23	2023-24 Forecast	2024-25	2025-26	2026-27	2027-28
Total Enrollment	275	299	320	335	346	347
ADA	254.51	281.06	304.00	319.93	330.43	331.39
% Free and Reduced	89%	89%	89%	89%	89%	89%
% English Language Learners	40%	40%	40%	40%	40%	40%
% Unduplicated Low Income, EL, Foster Youth	96%	96%	96%	96%	96%	96%
<b>INCOME</b>						
8011-8098 · Local Control Funding Formula Sources	3,355,140	4,022,476	4,513,193	4,907,719	5,232,311	5,352,771
8100-8299 · Federal Revenue	1,058,839	1,552,032	567,542	551,218	564,310	567,142
8300-8599 · Other State Revenue	1,680,842	911,077	1,586,920	1,085,166	1,114,343	1,064,473
8600-8799 · Other Local Revenue	330,674	260,469	279,280	292,339	300,953	301,736
Grants/Fundraising	11,960	5,000	5,000	5,000	5,000	5,000
8999 · Other Prior Year Adjustment	20,766	-	-	-	-	-
<b>TOTAL INCOME</b>	<b>6,458,221</b>	<b>6,751,054</b>	<b>6,951,935</b>	<b>6,841,441</b>	<b>7,216,916</b>	<b>7,291,122</b>
<b>EXPENSE</b>						
1000 · Certificated Salaries	1,650,918	2,222,794	2,311,706	2,404,174	2,476,299	2,550,588
2000 · Classified Salaries	792,262	903,811	939,964	878,129	904,472	931,607
3000 · Employee Benefits	713,129	830,996	876,050	905,731	939,602	974,824
4000 · Supplies	673,809	653,272	693,662	728,350	754,612	765,069
5000 · Operating Services	1,919,766	1,817,346	1,835,598	1,780,952	1,868,986	1,930,649
6000 · Capital Outlay	800,226	781,037	750,064	745,775	734,229	725,584
7000 · Other Outgo	158,651	145,165	141,523	137,808	134,017	130,151
<b>TOTAL EXPENSE</b>	<b>6,708,761</b>	<b>7,354,421</b>	<b>7,548,567</b>	<b>7,580,918</b>	<b>7,812,218</b>	<b>8,008,472</b>
<b>NET INCOME</b>	<b>(250,540)</b>	<b>(603,367)</b>	<b>(596,632)</b>	<b>(739,477)</b>	<b>(595,302)</b>	<b>(717,350)</b>
<b>Operating Income</b>		177,670	153,432	6,298	138,927	8,234
Ending Cash Balance	3,839,081	2,460,242	2,538,585	2,354,797	2,262,861	2,042,999

# HS– Summary Budget

**Bert Corona Charter High School**

*Multi-Year Budget Summary*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	2022-23	2023-24 Forecast	2024-25	2025-26	2026-27	2027-28
Total Enrollment	210	213	241	255	275	280
ADA	180.50	195.96	224.13	237.15	255.75	260.40
% Free and Reduced	92%	92%	92%	92%	92%	92%
% English Language Learners	21%	21%	21%	21%	21%	21%
% Unduplicated Low Income, EL, Foster Youth	92%	92%	92%	92%	92%	92%
<b>INCOME</b>						
8011-8098 · Local Control Funding Formula Sources	2,830,917	3,340,677	3,979,135	4,348,941	4,839,518	5,026,089
8100-8299 · Federal Revenue	877,098	566,077	307,407	320,146	337,721	342,511
8300-8599 · Other State Revenue	283,858	788,121	573,666	419,446	432,027	439,302
8600-8799 · Other Local Revenue	246,987	226,790	249,361	262,103	280,308	284,859
Grants/Fundraising	18,711	20,000	22,629	23,944	25,822	26,291
8999 · Other Prior Year Adjustment	(255)	-	-	-	-	-
<b>TOTAL INCOME</b>	<b>4,257,315</b>	<b>4,941,664</b>	<b>5,132,198</b>	<b>5,374,580</b>	<b>5,915,395</b>	<b>6,119,051</b>
<b>EXPENSE</b>						
1000 · Certificated Salaries	1,415,527	1,634,020	1,622,779	1,687,690	1,755,197	1,825,405
2000 · Classified Salaries	549,986	805,110	804,546	836,728	870,197	905,005
3000 · Employee Benefits	643,865	805,747	835,310	885,963	940,022	997,733
4000 · Supplies	390,046	359,556	417,525	451,721	497,890	517,586
5000 · Operating Services	1,205,575	1,244,752	1,404,434	1,498,047	1,627,796	1,685,253
6000 · Capital Outlay	43,727	39,111	4,559	2,722	121	-
7000 · Other Outgo	-	-	-	-	-	-
<b>TOTAL EXPENSE</b>	<b>4,248,727</b>	<b>4,888,298</b>	<b>5,089,153</b>	<b>5,362,870</b>	<b>5,691,223</b>	<b>5,930,982</b>
<b>NET INCOME</b>	<b>8,589</b>	<b>53,366</b>	<b>43,045</b>	<b>11,710</b>	<b>224,172</b>	<b>188,070</b>
Ending Cash Balance	666,673	197,082	176,758	175,902	327,133	502,937

**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
Enrollment	333	346	355	375	375	375		
ADA	307.25	325.24	337.25	356.25	358.13	358.13		
ADA %		94%	95%	95%	96%	96%		
UPP		87%	88%	88%	88%	88%		
<b>Income</b>								
<b>8011-8098 · Local Control Funding Formula Sources</b>								
8011 Local Control Funding Formula	2,341,236	2,727,431	3,022,975	3,368,748	3,560,135	3,672,681	35%	16%
8012 Education Protection Account	684,653	778,227	806,965	852,427	856,914	856,914	10%	14%
8019 Local Control Funding Formula - Prior Year	(31,837)						0%	-100%
8096 In Lieu of Property Taxes	973,322	1,080,229	1,120,119	1,183,224	1,189,451	1,189,451	14%	11%
8098 In Lieu of Property Taxes, Prior Year	31,837						0%	-100%
<b>Total 8011-8098 · Local Control Funding Formula Sources</b>	<b>3,999,211</b>	<b>4,585,888</b>	<b>4,950,059</b>	<b>5,404,399</b>	<b>5,606,500</b>	<b>5,719,046</b>	<b>59%</b>	<b>15%</b>
<b>8100-8299 · Federal Revenue</b>							0%	
8181 Special Education - Federal (IDEA)	75,159	79,560	82,498	87,146	87,605	87,605	1%	6%
8221 Child Nutrition - Federal	357,012	352,167	361,327	381,684	381,684	381,684	5%	-1%
8223 CACFP Supper	-	-	-	-	-	-	0%	
8291 Title I	131,172	131,172	131,172	131,172	131,172	131,172	2%	0%
8292 Title II	16,901	16,901	16,901	16,901	16,901	16,901	0%	0%
8294 Title III	12,355	12,470	12,803	13,136	13,876	13,876	0%	1%
8295 Title IV, SSAE	10,000	10,000	10,000	10,000	10,000	10,000	0%	0%
8296 Title IV, PCSGP	-	-	-	-	-	-	0%	
8297 Facilities Incentive Grant	-	-	-	-	-	-	0%	
8299 All Other Federal Revenue	422,414	845,605	103,757	-	-	-	11%	100%
<b>Total 8100-8299 · Other Federal Income</b>	<b>1,025,014</b>	<b>1,447,875</b>	<b>718,458</b>	<b>640,038</b>	<b>641,237</b>	<b>641,237</b>	<b>19%</b>	<b>41%</b>
<b>8300-8599 · Other State Revenue</b>								
8520 Child Nutrition - State	135,198	137,404	140,978	148,920	148,920	148,920	2%	2%
8550 Mandate Block Grant	5,699	6,098	6,710	7,186	7,833	8,032	0%	7%
8561 State Lottery - Non Prop 20	52,467	55,291	57,333	60,563	60,881	60,881	1%	5%
8562 State Lottery - Prop 20	20,678	21,791	22,596	23,869	23,994	23,994	0%	5%
8560 Lottery Revenue	73,145	77,082	79,928	84,431	84,876	84,876	1%	5%
8587 State Grant Pass-Through	-	-	-	-	-	-	0%	
8591 SB740	272,647	279,542	267,738	216,462	230,566	222,085	4%	3%
8592 State Mental Health	-	-	-	-	-	-	0%	
8593 After School Education & Safety	203,483	203,483	203,483	203,483	203,483	203,483	3%	0%
8594 Supplemental Categorical Block Grant	-	-	-	-	-	-	0%	
8595 Expanded Learning Opportunity Program	250,000	205,980	288,981	309,871	310,083	311,857	3%	-18%
8596 Prop 28 Arts & Music		58,785	60,355	61,925	65,413	65,413	1%	

**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
8599 State Revenue - Other	529,259	363,527	903,811	250,000	250,000	187,561	5%	-31%
<b>Total 8300-8599 · Other State Income</b>	<b>1,469,431</b>	<b>1,331,900</b>	<b>1,951,982</b>	<b>1,282,279</b>	<b>1,301,174</b>	<b>1,232,226</b>	<b>17%</b>	<b>-9%</b>
<b>8600-8799 · Other Local Revenue</b>								
8631 Sale of Equipment & Supplies	-	-	-	-	-	-	0%	
8634 Food Service Sales	-	-	-	-	-	-	0%	
8650 Leases & Rentals	-	-	-	-	-	-	0%	
8660 Interest & Dividend Income	574	-	-	-	-	-	0%	-100%
8662 Net Increase (Decrease) in Fair Value of Investments	-	-	-	-	-	-	0%	
8681 Intra-Agency Fee Income	-	-	-	-	-	-	0%	
8682 Childcare & Enrichment Program Fees	-	-	-	-	-	-	0%	
8689 All Other Fees & Contracts	-	-	-	-	-	-	0%	
8692 Grants	20,750	5,500	5,500	5,500	5,500	5,500	0%	-73%
8694 In Kind Donations	-	-	-	-	-	-	0%	
8695 Contributions & Events	30,000	20,000	20,000	20,000	20,000	20,000	0%	-33%
8696 Other Fundraising	-	-	-	-	-	-	0%	
8697 E-Rate	32,400	32,400	32,400	32,400	32,400	32,400	0%	0%
8698 SELPA Grants	134,630	30,000	20,000	20,000	20,000	20,000	0%	-78%
8699 All Other Local Revenue	32,400	20,000	20,000	20,000	20,000	20,000	0%	-38%
8792 Transfers of Apportionments - Special Education	300,712	318,319	330,073	348,669	350,504	350,504	4%	6%
<b>Total 8600-8799 · Other Income-Local</b>	<b>551,466</b>	<b>426,219</b>	<b>427,973</b>	<b>446,569</b>	<b>448,404</b>	<b>448,404</b>	<b>5%</b>	<b>-23%</b>
<b>Prior Year Adjustments</b>								
8999 Other Prior Year Adjustment	14,079	-	-	-	-	-	0%	-100%
<b>Total Prior Year Adjustments</b>	<b>14,079</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	<b>-100%</b>
<b>TOTAL INCOME</b>	<b>7,059,201</b>	<b>7,791,881</b>	<b>8,048,472</b>	<b>7,773,286</b>	<b>7,997,316</b>	<b>8,040,913</b>	<b>100%</b>	<b>10%</b>
<b>Expense</b>								
<b>1000 · Certificated Salaries</b>								
1110 Teachers' Salaries	1,255,356	1,509,692	1,570,080	1,632,883	1,681,869	1,732,325	20%	20%
1120 Teachers' Hourly	-	-	-	-	-	-	0%	
1170 Teachers' Salaries - Substitute	-	-	-	-	-	-	0%	
1175 Teachers' Salaries - Stipend/Extra Duty	226,302	290,802	302,434	314,531	323,967	333,686	4%	29%
1211 Certificated Pupil Support - Librarians	-	-	-	-	-	-	0%	
1213 Certificated Pupil Support - Guidance & Counseling	59,094	98,974	102,932	107,050	110,261	113,569	1%	67%
1215 Certificated Pupil Support - Psychologist	41,626	89,735	93,324	97,057	99,969	102,968	1%	116%
1299 Certificated Pupil Support - Other	9,501	-	-	-	-	-	0%	-100%
1300 Certificated Supervisors' & Administrators' Salaries	271,803	300,960	312,998	325,518	335,284	345,342	4%	11%
1900 Other Certificated Salaries	-	-	-	-	-	-	0%	
<b>Total 1000 · Certificated Salaries</b>	<b>1,863,682</b>	<b>2,290,162</b>	<b>2,381,768</b>	<b>2,477,039</b>	<b>2,551,350</b>	<b>2,627,891</b>	<b>30%</b>	<b>23%</b>

**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>2000 - Classified Salaries</b>								
2111 Instructional Aide & Other Salaries	245,453	326,854	339,929	241,055	248,286	193,680	4%	33%
2121 After School Staff Salaries	-	-	-	-	-	-	0%	
2131 Classified Teacher Salaries	58,238	54,598	56,781	59,053	60,824	62,649	1%	-6%
2200 Classified Support Salaries	58,320	91,640	95,305	99,117	102,091	105,154	1%	57%
2300 Classified Supervisors' & Administrators' Salaries	46,745	38,905	40,461	42,080	43,342	44,642	1%	-17%
2400 Classified Office Staff Salaries	461,917	512,466	532,965	554,283	570,912	588,039	7%	11%
2900 Other Classified Salaries	44,300	62,948	65,466	68,084	70,127	72,231	1%	42%
<b>Total 2000 - Classified Salaries</b>	<b>914,973</b>	<b>1,087,410</b>	<b>1,130,907</b>	<b>1,063,672</b>	<b>1,095,582</b>	<b>1,066,395</b>	<b>14%</b>	<b>19%</b>
<b>3000 - Employee Benefits</b>								
3111 STRS - State Teachers Retirement System	356,125	437,421	454,918	473,114	487,308	501,927	6%	23%
3212 PERS - Public Employee Retirement System	-	-	-	-	-	-	0%	
3213 PARS - Public Agency Retirement System	-	-	-	-	-	-	0%	
3311 OASDI - Social Security	55,596	67,419	70,116	65,948	67,926	66,116	1%	21%
3331 MED - Medicare	40,778	48,975	50,934	51,340	52,881	53,567	1%	20%
3401 H&W - Health & Welfare	371,789	435,078	469,884	490,889	515,433	531,878	6%	17%
3501 SUI - State Unemployment Insurance	15,822	1,689	1,756	1,770	1,823	1,847	0%	-89%
3601 Workers' Compensation Insurance	-	-	-	-	-	-	0%	
3751 OPEB, Active Employees	-	-	-	-	-	-	0%	
3901 Other Retirement Benefits	16,779	10,874	11,309	10,637	10,956	10,664	0%	-35%
3902 Other Benefits	629						0%	-100%
<b>Total 3000 - Employee Benefits</b>	<b>857,517</b>	<b>1,001,456</b>	<b>1,058,917</b>	<b>1,093,698</b>	<b>1,136,327</b>	<b>1,166,000</b>	<b>13%</b>	<b>17%</b>
<b>4000 - Supplies</b>								
4111 Core Curricula Materials	117,856	77,856	83,029	108,592	112,056	115,418	1%	-34%
4211 Books & Other Reference Materials	18,500	18,500	19,729	12,909	13,321	13,720	0%	0%
4311 Student Materials	77,645	89,758	95,078	102,953	105,602	108,050	1%	16%
4351 Office Supplies	13,200	13,200	14,077	9,600	9,906	10,203	0%	0%
4371 Custodial Supplies	19,200	19,200	20,476	22,341	23,053	23,745	0%	0%
4391 Food (Non Nutrition Program)	12,500	12,500	13,330	14,545	15,009	15,459	0%	0%
4392 Uniforms	50,000	50,000	41,576	22,500	23,218	23,914	1%	0%
4393 PE & Sports Equipment	13,500	13,500	3,638	3,758	3,877	3,994	0%	0%
4395 Before & After School Program Supplies	178	190	203	222	229	235	0%	7%
4399 All Other Supplies	54,200	47,000	50,123	54,688	56,433	58,126	1%	-13%
4390 Other Supplies	130,378	123,190	108,870	95,712	98,765	101,728	2%	-6%
4411 Non Capitalized Equipment	150,500	150,500	152,726	122,500	122,675	122,846	2%	0%
4711 Nutrition Program Food & Supplies	385,609	371,931	383,513	407,145	409,181	411,227	5%	-4%
4713 CACFP Supper Food & Supplies	-	-	-	-	-	-	0%	

**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>Total 4000 · Supplies</b>	<b>912,888</b>	<b>864,135</b>	<b>877,497</b>	<b>881,752</b>	<b>894,560</b>	<b>906,937</b>	<b>11%</b>	<b>-5%</b>
<b>5000 · Operating Services</b>								
5211 Travel & Conferences	15,299	15,299	16,315	17,802	18,369	18,921	0%	0%
5311 Dues & Memberships	10,933	10,933	11,633	12,283	12,671	13,053	0%	0%
5451 General Insurance	-	-	-	-	-	-	0%	
5511 Utilities	91,200	91,200	97,259	106,118	109,504	112,789	1%	0%
5521 Security Services	3,600	3,600	3,839	4,189	4,323	4,452	0%	0%
5531 Housekeeping Services	38,954	50,954	54,339	59,289	61,180	63,016	1%	31%
5599 Other Facility Operations & Utilities	41,200	47,200	49,060	50,674	52,290	53,859	1%	15%
5611 School Rent - Private Facility	159,420	167,945	167,945	167,945	167,945	167,945	2%	5%
5613 School Rent - Prop 39	-	-	-	-	-	-	0%	
5619 Other Facility Rentals	2,500	-	-	-	-	-	0%	-100%
5621 Equipment Lease	33,888	34,020	36,280	39,585	40,848	42,073	0%	0%
5631 Vendor Repairs	215,300	180,300	187,404	100,162	131,124	102,058	2%	-16%
5812 Field Trips & Pupil Transportation	118,406	118,406	123,071	104,575	107,911	111,148	2%	0%
5821 Legal	-	-	-	-	-	-	0%	
5823 Audit	-	-	-	-	-	-	0%	
5831 Advertisement & Recruitment	69,950	63,000	67,185	16,636	17,166	17,681	1%	-10%
5841 Contracted Substitute Teachers	99,100	56,700	60,467	65,975	68,080	70,122	1%	-43%
5842 Special Education Services	112,955	120,886	128,917	140,660	145,147	149,502	2%	7%
5843 Non Public School	-	-	-	-	-	-	0%	
5844 After School Services	203,483	217,769	232,237	253,392	261,475	269,320	3%	7%
5849 Other Student Instructional Services	-	-	-	-	-	-	0%	
5852 PD Consultants & Tuition	42,559	31,425	33,513	36,565	37,732	38,864	0%	-26%
5854 Nursing & Medical (Non-IEP)	8,000	3,000	3,199	3,491	3,602	3,710	0%	-63%
5859 All Other Consultants & Services	109,220	102,520	102,521	39,354	41,322	43,388	1%	-6%
5861 Non Instructional Software	54,446	54,446	58,063	63,352	65,373	67,335	1%	0%
5865 Fundraising Cost	-	-	-	-	-	-	0%	
5871 District Oversight Fees	39,992	45,859	49,501	54,044	56,065	57,190	1%	15%
5872 Special Education Fees (SELPA)	75,174	79,576	82,514	87,163	87,622	87,622	1%	6%
5881 Intra-Agency Fees	708,403	758,709	732,050	709,725	687,357	683,894	10%	7%
5895 Bad Debt Expense	-	-	-	-	-	-	0%	
5898 Uncategorized Expense	8,786	-	-	-	-	-	0%	-100%
5899 All Other Expenses	8,300	8,300	8,851	9,658	9,966	10,265	0%	0%
5911 Office Phone	13,200	13,200	13,720	14,171	14,624	15,062	0%	0%
5913 Mobile Phone	22,440	22,440	23,324	4,767	4,919	5,066	0%	0%
5921 Internet	36,000	36,000	37,418	38,649	39,882	41,079	0%	0%



**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
5923 Website Hosting	13,600	3,600	3,742	3,865	3,988	4,108	0%	-74%
5931 Postage & Shipping	2,948	3,037	3,157	3,260	3,364	3,465	0%	3%
5999 Other Communications	3,000	3,000	3,118	3,221	3,324	3,423	0%	0%
<b>Total 5000 · Operating Services</b>	<b>2,362,257</b>	<b>2,343,324</b>	<b>2,390,644</b>	<b>2,210,571</b>	<b>2,257,173</b>	<b>2,260,409</b>	<b>31%</b>	<b>-1%</b>
<b>6000 · Capital Outlay</b>								
6901 Depreciation Expense	87,626	80,246	49,766	40,416	26,783	6,396	1%	-8%
6911 Amortization Expense - Lease Assets	-	-	-	-	-	-	0%	
6912 Amortization Expense - Other	-	-	-	-	-	-	0%	
6999 Capital Outlay	-	-	-	-	-	-	0%	
<b>Total 6000 · Capital Outlay</b>	<b>87,626</b>	<b>80,246</b>	<b>49,766</b>	<b>40,416</b>	<b>26,783</b>	<b>6,396</b>	<b>1%</b>	<b>-8%</b>
<b>7000 · Other Outgo</b>								
7438 Interest Expense	-	-	-	-	-	-	0%	
<b>Total 7000 · Other Outgo</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	
<b>TOTAL EXPENSE</b>	<b>6,998,941</b>	<b>7,666,733</b>	<b>7,889,499</b>	<b>7,767,147</b>	<b>7,961,775</b>	<b>8,034,027</b>	<b>100%</b>	<b>10%</b>
<b>NET INCOME</b>	<b>60,259</b>	<b>125,148</b>	<b>158,974</b>	<b>6,138</b>	<b>35,541</b>	<b>6,886</b>		
<b>Beginning Cash Balance</b>	2,555,367	3,036,162	1,786,152	2,071,104	2,149,054	2,184,024		
<b>Cash Flow from Operating Activities</b>								
Net Income	60,259	125,148	158,974	6,138	35,541	6,886		
Change in Accounts Receivable								
Prior Year Accounts Receivable	2,409,809	1,252,853	1,334,159	1,236,106	1,183,346	1,189,759		
Current Year Accounts Receivable	(1,252,853)	(1,334,159)	(1,236,106)	(1,183,346)	(1,189,759)	(1,205,054)		
Change in Due from	38	-	-	-	-	-		
Change in Accounts Payable	(1,161,077)	(16,519)	(15,693)	(14,908)	(14,163)	(13,455)		
Change in Due to	1,075,447	(1,155,764)	-	-	-	-		
Change in Accrued Vacation	-	-	-	-	-	-		
Change in Payroll Liabilities	(43,536)	-	-	-	-	-		
Change in Prepaid Expenditures	(15,144)	(62,976)	(6,148)	(6,455)	(6,778)	(7,117)		
Change in Deposits	(98,000)	-	-	-	-	-		
Change in Deferred Revenue	(505,275)	-	-	-	-	-		
Change in Other Long Term Assets	-	-	-	-	-	-		
Change in Other Long Term Liabilities	-	-	-	-	-	-		
Depreciation Expense	87,626	80,246	49,766	40,416	26,783	6,396		
<b>Cash Flow from Investing Activities</b>								
Capital Expenditures	(76,500)	(50,000)	-	-	-	-		
<b>Cash Flow from Financing Activities</b>								
Source - Sale of Receivables	-	-	-	-	-	-		

**BERT CORONA CHARTER SCHOOL**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4	
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget
Use - Sale of Receivables	-	-	-	-	-	-	
Source - Loans	-	-	-	-	-	-	
Use - Loans	-	-	-	-	-	-	
<b>Ending Cash Balance</b>	<b>3,036,162</b>	<b>1,874,990</b>	<b>2,071,104</b>	<b>2,149,054</b>	<b>2,184,024</b>	<b>2,161,440</b>	
Month with Lowest Ending Cash Balance	Jul: \$	Mar: \$846,877	Oct: \$1,554,918	Mar: \$1,791,469	Sep: \$1,959,980	Mar: \$1,978,939	
5% Reserve Goal	349,947	383,337	394,475	388,357	398,089	401,701	
Operating Income	147,885	205,394	208,739	46,554	62,323	13,282	
EBITDA	147,885	205,394	208,739	46,554	62,323	13,282	
Net Income as a Percent of Expenses	0.9%	1.6%	2.0%	0.1%	0.4%	0.1%	
Ending Cash as a Percent of Expenses	43.4%	24.5%	26.3%	27.7%	27.4%	26.9%	

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
Enrollment	275	299	320	335	346	347		
ADA	254.51	281.06	304.00	319.93	330.43	331.39		
ADA %		94%	95%	96%	96%	96%		
UPP		96%	96%	96%	96%	96%		
<b>Income</b>								
<b>8011-8098 · Local Control Funding Formula Sources</b>								
8011 Local Control Funding Formula	1,981,087	2,415,670	2,775,241	3,078,724	3,343,259	3,458,260	36%	22%
8012 Education Protection Account	567,804	673,313	728,268	766,418	791,584	793,872	10%	19%
8019 Local Control Funding Formula - Prior Year	(13,650)						0%	-100%
8096 In Lieu of Property Taxes	806,250	933,493	1,009,684	1,062,577	1,097,467	1,100,639	14%	16%
8098 In Lieu of Property Taxes, Prior Year	13,650						0%	-100%
<b>Total 8011-8098 · Local Control Funding Formula Sources</b>	<b>3,355,140</b>	<b>4,022,476</b>	<b>4,513,193</b>	<b>4,907,719</b>	<b>5,232,311</b>	<b>5,352,771</b>	<b>60%</b>	<b>20%</b>
<b>8100-8299 · Federal Revenue</b>							0%	
8181 Special Education - Federal (IDEA)	62,258	34,625	37,375	40,000	41,875	43,250	1%	-44%
8221 Child Nutrition - Federal	275,515	286,368	306,481	320,848	331,383	332,341	4%	4%
8223 CACFP Supper	-	-	-	-	-	-	0%	
8291 Title I	147,967	147,967	147,967	147,967	147,967	147,967	2%	0%
8292 Title II	16,715	16,715	16,715	16,715	16,715	16,715	0%	0%
8294 Title III	13,499	12,584	13,583	14,537	15,219	15,719	0%	-7%
8295 Title IV, SSAFE	11,151	11,151	11,151	11,151	11,151	11,151	0%	0%
8296 Title IV, PCSGP	-	-	-	-	-	-	0%	
8297 Facilities Incentive Grant	-	-	-	-	-	-	0%	
8299 All Other Federal Revenue	531,733	1,042,622	34,269	-	-	-	15%	96%
<b>Total 8100-8299 · Other Federal Income</b>	<b>1,058,839</b>	<b>1,552,032</b>	<b>567,542</b>	<b>551,218</b>	<b>564,310</b>	<b>567,142</b>	<b>23%</b>	<b>47%</b>
<b>8300-8599 · Other State Revenue</b>								
8520 Child Nutrition - State	101,522	108,530	116,152	121,597	125,590	125,953	2%	7%
8550 Mandate Block Grant	5,029	5,051	5,798	6,478	7,035	7,411	0%	0%
8561 State Lottery - Non Prop 20	43,428	47,780	51,680	54,387	56,173	56,335	1%	10%
8562 State Lottery - Prop 20	17,116	18,831	20,368	21,435	22,139	22,203	0%	10%
8560 Lottery Revenue	60,544	66,611	72,048	75,822	78,312	78,538	1%	10%
8587 State Grant Pass-Through	-	-	-	-	-	-	0%	
8591 SB740	-	-	-	-	-	-	0%	
8592 State Mental Health	-	-	-	-	-	-	0%	
8593 After School Education & Safety	203,483	227,879	253,493	274,106	292,138	301,771	3%	12%
8594 Supplemental Categorical Block Grant	-	-	-	-	-	-	0%	
8595 Expanded Learning Opportunity Program	200,000	153,405	235,433	299,863	301,283	301,283	2%	-23%
8596 Prop 28 Arts & Music		49,600	53,540	57,300	59,986	61,955	1%	

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
8599 State Revenue - Other	1,110,264	300,000	850,457	250,000	250,000	187,561	4%	-73%
<b>Total 8300-8599 · Other State Income</b>	<b>1,680,842</b>	<b>911,077</b>	<b>1,586,920</b>	<b>1,085,166</b>	<b>1,114,343</b>	<b>1,064,473</b>	<b>13%</b>	<b>-46%</b>
<b>8600-8799 · Other Local Revenue</b>								
8631 Sale of Equipment & Supplies	-	-	-	-	-	-	0%	
8634 Food Service Sales	-	-	-	-	-	-	0%	
8650 Leases & Rentals	-	-	-	-	-	-	0%	
8660 Interest & Dividend Income	-	-	-	-	-	-	0%	
8662 Net Increase (Decrease) in Fair Value of Investments	-	-	-	-	-	-	0%	
8681 Intra-Agency Fee Income	-	-	-	-	-	-	0%	
8682 Childcare & Enrichment Program Fees	-	-	-	-	-	-	0%	
8689 All Other Fees & Contracts	-	-	-	-	-	-	0%	
8692 Grants	10,000	5,000	5,000	5,000	5,000	5,000	0%	-50%
8694 In Kind Donations	-	-	-	-	-	-	0%	
8695 Contributions & Events	1,960	-	-	-	-	-	0%	-100%
8696 Other Fundraising	-	-	-	-	-	-	0%	
8697 E-Rate	-	-	-	-	-	-	0%	
8698 SELPA Grants	56,380	15,000	15,000	15,000	15,000	15,000	0%	-73%
8699 All Other Local Revenue	25,200	15,000	15,000	15,000	15,000	15,000	0%	-40%
8792 Transfers of Apportionments - Special Education	249,094	230,469	249,280	262,339	270,953	271,736	3%	-7%
<b>Total 8600-8799 · Other Income-Local</b>	<b>342,634</b>	<b>265,469</b>	<b>284,280</b>	<b>297,339</b>	<b>305,953</b>	<b>306,736</b>	<b>4%</b>	<b>-23%</b>
<b>Prior Year Adjustments</b>								
8999 Other Prior Year Adjustment	20,766	-	-	-	-	-	0%	-100%
<b>Total Prior Year Adjustments</b>	<b>20,766</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	<b>-100%</b>
<b>TOTAL INCOME</b>	<b>6,458,221</b>	<b>6,751,054</b>	<b>6,951,935</b>	<b>6,841,441</b>	<b>7,216,916</b>	<b>7,291,122</b>	<b>100%</b>	<b>5%</b>
<b>Expense</b>								
<b>1000 · Certificated Salaries</b>								
1110 Teachers' Salaries	1,202,862	1,600,116	1,664,121	1,730,685	1,782,606	1,836,084	22%	33%
1120 Teachers' Hourly	-	-	-	-	-	-	0%	
1170 Teachers' Salaries - Substitute	10,886	48,891	50,847	52,881	54,467	56,101	1%	349%
1175 Teachers' Salaries - Stipend/Extra Duty	204,313	239,953	249,551	259,534	267,320	275,339	3%	17%
1211 Certificated Pupil Support - Librarians	-	-	-	-	-	-	0%	
1213 Certificated Pupil Support - Guidance & Counseling	54,695	78,023	81,144	84,390	86,922	89,529	1%	43%
1215 Certificated Pupil Support - Psychologist	17,904	77,235	80,325	83,538	86,044	88,625	1%	331%
1299 Certificated Pupil Support - Other	1,916	-	-	-	-	-	0%	-100%
1300 Certificated Supervisors' & Administrators' Salaries	158,342	178,575	185,718	193,147	198,941	204,910	2%	13%
1900 Other Certificated Salaries	-	-	-	-	-	-	0%	
<b>Total 1000 · Certificated Salaries</b>	<b>1,650,918</b>	<b>2,222,794</b>	<b>2,311,706</b>	<b>2,404,174</b>	<b>2,476,299</b>	<b>2,550,588</b>	<b>30%</b>	<b>35%</b>

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>2000 • Classified Salaries</b>								
2111 Instructional Aide & Other Salaries	187,719	234,779	244,170	184,746	190,288	195,997	3%	25%
2121 After School Staff Salaries	-	-	-	-	-	-	0%	
2131 Classified Teacher Salaries	180	-	-	-	-	-	0%	-100%
2200 Classified Support Salaries	78,097	88,420	91,957	65,393	67,354	69,375	1%	13%
2300 Classified Supervisors' & Administrators' Salaries	56,862	34,305	35,677	37,104	38,217	39,364	0%	-40%
2400 Classified Office Staff Salaries	405,051	509,045	529,406	550,583	567,100	584,113	7%	26%
2900 Other Classified Salaries	64,354	37,263	38,753	40,303	41,512	42,758	1%	-42%
<b>Total 2000 • Classified Salaries</b>	<b>792,262</b>	<b>903,811</b>	<b>939,964</b>	<b>878,129</b>	<b>904,472</b>	<b>931,607</b>	<b>12%</b>	<b>14%</b>
<b>3000 • Employee Benefits</b>								
3111 STRS - State Teachers Retirement System	295,455	424,554	441,536	459,197	472,973	487,162	6%	44%
3212 PERS - Public Employee Retirement System	-	-	-	-	-	-	0%	
3213 PARS - Public Agency Retirement System	-	-	-	-	-	-	0%	
3311 OASDI - Social Security	50,221	56,036	58,278	54,444	56,077	57,760	1%	12%
3331 MED - Medicare	35,597	45,336	47,149	47,593	49,021	50,492	1%	27%
3401 H&W - Health & Welfare	306,601	295,372	319,002	334,952	351,700	369,285	4%	-4%
3501 SUI - State Unemployment Insurance	13,743	1,563	1,626	1,641	1,690	1,741	0%	-89%
3601 Workers' Compensation Insurance	-	-	-	-	-	-	0%	
3751 OPEB, Active Employees	-	-	-	-	-	-	0%	
3901 Other Retirement Benefits	10,840	8,134	8,460	7,903	8,140	8,384	0%	-25%
3902 Other Benefits	672	-	-	-	-	-	0%	-100%
<b>Total 3000 • Employee Benefits</b>	<b>713,129</b>	<b>830,996</b>	<b>876,050</b>	<b>905,731</b>	<b>939,602</b>	<b>974,824</b>	<b>11%</b>	<b>17%</b>
<b>4000 • Supplies</b>								
4111 Core Curricula Materials	78,804	45,354	50,452	73,004	77,807	80,373	1%	-42%
4211 Books & Other Reference Materials	10,000	10,000	10,562	8,014	8,410	8,621	0%	0%
4311 Student Materials	58,537	77,952	86,134	92,549	97,931	100,495	1%	33%
4351 Office Supplies	10,800	9,600	9,600	9,600	9,600	9,600	0%	-11%
4371 Custodial Supplies	18,000	14,400	14,400	14,400	14,400	14,400	0%	-20%
4391 Food (Non Nutrition Program)	6,000	6,000	6,000	6,000	6,000	6,000	0%	0%
4392 Uniforms	13,000	13,000	13,512	13,957	14,402	14,834	0%	0%
4393 PE & Sports Equipment	6,400	6,400	7,119	7,698	8,205	8,475	0%	0%
4395 Before & After School Program Supplies	2,000	2,000	2,160	2,268	2,381	2,500	0%	0%
4399 All Other Supplies	44,000	45,000	46,773	36,502	37,667	38,797	1%	2%
4390 Other Supplies	71,400	72,400	75,565	66,425	68,655	70,606	1%	1%
4411 Non Capitalized Equipment	133,800	127,300	128,290	129,092	129,804	130,219	2%	-5%
4711 Nutrition Program Food & Supplies	292,468	296,266	318,660	335,265	348,005	350,756	4%	1%
4713 CACFP Supper Food & Supplies	-	-	-	-	-	-	0%	

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>Total 4000 - Supplies</b>	<b>673,809</b>	<b>653,272</b>	<b>693,662</b>	<b>728,350</b>	<b>754,612</b>	<b>765,069</b>	<b>9%</b>	<b>-3%</b>
<b>5000 - Operating Services</b>								
5211 Travel & Conferences	22,224	17,099	17,773	17,497	18,055	18,597	0%	-23%
5311 Dues & Memberships	7,084	6,805	7,570	8,185	8,724	9,011	0%	-4%
5451 General Insurance	-	-	-	-	-	-	0%	
5511 Utilities	98,400	98,400	109,460	118,361	126,147	130,307	1%	0%
5521 Security Services	1,440	1,440	1,602	1,732	1,846	1,907	0%	0%
5531 Housekeeping Services	36,000	36,000	37,418	38,649	39,882	41,079	0%	0%
5599 Other Facility Operations & Utilities	244,207	100,000	100,000	100,000	100,000	100,000	1%	-59%
5611 School Rent - Private Facility	-	-	-	-	-	-	0%	
5613 School Rent - Prop 39	-	-	-	-	-	-	0%	
5619 Other Facility Rentals	2,500	2,800	3,114	3,368	3,589	3,708	0%	12%
5621 Equipment Lease	22,408	22,408	24,051	25,403	26,637	27,476	0%	0%
5631 Vendor Repairs	28,072	30,000	30,000	30,000	30,000	30,000	0%	7%
5812 Field Trips & Pupil Transportation	48,200	48,200	50,099	39,938	41,212	42,448	1%	0%
5821 Legal	-	-	-	-	-	-	0%	
5823 Audit	-	-	-	-	-	-	0%	
5831 Advertisement & Recruitment	67,000	56,000	62,294	12,217	13,021	13,450	1%	-16%
5841 Contracted Substitute Teachers	19,600	19,600	21,803	23,576	25,127	25,956	0%	0%
5842 Special Education Services	100,000	111,989	124,577	134,707	143,569	148,303	2%	12%
5843 Non Public School	-	-	-	-	-	-	0%	
5844 After School Services	203,483	227,879	253,493	274,106	292,138	301,771	3%	12%
5849 Other Student Instructional Services	55,000	72,000	-	-	-	-	1%	31%
5852 PD Consultants & Tuition	38,925	37,925	42,188	36,561	38,966	40,251	1%	-3%
5854 Nursing & Medical (Non-IEP)	8,000	3,000	3,118	3,221	3,324	3,423	0%	-63%
5859 All Other Consultants & Services	84,020	84,020	93,464	30,096	32,075	33,133	1%	0%
5861 Non Instructional Software	62,750	62,750	69,803	73,074	77,881	80,449	1%	0%
5865 Fundraising Cost	-	-	-	-	-	-	0%	
5871 District Oversight Fees	33,551	40,225	45,132	49,077	52,323	53,528	1%	20%
5872 Special Education Fees (SELPA)	62,270	7,953	8,600	9,070	9,385	9,450	0%	-87%
5881 Intra-Agency Fees	603,828	655,648	652,470	692,927	723,767	753,220	9%	9%
5895 Bad Debt Expense	-	-	-	-	-	-	0%	
5898 Uncategorized Expense	(2,221)	-	-	-	-	-	0%	-100%
5899 All Other Expenses	8,600	8,600	9,377	10,009	10,572	10,912	0%	0%
5911 Office Phone	8,400	8,400	8,731	9,018	9,306	9,585	0%	0%
5913 Mobile Phone	22,800	23,484	24,409	25,212	26,017	26,797	0%	3%
5921 Internet	20,400	22,800	23,698	3,221	3,324	3,423	0%	12%

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
5923 Website Hosting	4,718	3,754	2,863	2,957	3,051	3,143	0%	-20%
5931 Postage & Shipping	2,106	2,169	2,254	2,328	2,403	2,475	0%	3%
5999 Other Communications	6,000	6,000	6,236	6,442	6,647	6,846	0%	0%
<b>Total 5000 · Operating Services</b>	<b>1,919,766</b>	<b>1,817,346</b>	<b>1,835,598</b>	<b>1,780,952</b>	<b>1,868,986</b>	<b>1,930,649</b>	<b>25%</b>	<b>-5%</b>
<b>6000 · Capital Outlay</b>								
6901 Depreciation Expense	800,226	781,037	750,064	745,775	734,229	725,584	11%	-2%
6911 Amortization Expense - Lease Assets	-	-	-	-	-	-	0%	
6912 Amortization Expense - Other	-	-	-	-	-	-	0%	
6999 Capital Outlay	-	-	-	-	-	-	0%	
<b>Total 6000 · Capital Outlay</b>	<b>800,226</b>	<b>781,037</b>	<b>750,064</b>	<b>745,775</b>	<b>734,229</b>	<b>725,584</b>	<b>11%</b>	<b>-2%</b>
<b>7000 · Other Outgo</b>								
7438 Interest Expense	158,651	145,165	141,523	137,808	134,017	130,151	2%	-9%
<b>Total 7000 · Other Outgo</b>	<b>158,651</b>	<b>145,165</b>	<b>141,523</b>	<b>137,808</b>	<b>134,017</b>	<b>130,151</b>	<b>2%</b>	<b>-9%</b>
<b>TOTAL EXPENSE</b>	<b>6,708,761</b>	<b>7,354,421</b>	<b>7,548,567</b>	<b>7,580,918</b>	<b>7,812,218</b>	<b>8,008,472</b>	<b>100%</b>	<b>10%</b>
<b>NET INCOME</b>	<b>(250,540)</b>	<b>(603,367)</b>	<b>(596,632)</b>	<b>(739,477)</b>	<b>(595,302)</b>	<b>(717,350)</b>		
<b>Beginning Cash Balance</b>	4,370,985	3,839,081	2,460,242	2,538,585	2,354,797	2,262,861		
<b>Cash Flow from Operating Activities</b>								
Net Income	(250,540)	(603,367)	(596,632)	(739,477)	(595,302)	(717,350)		
Change in Accounts Receivable								
Prior Year Accounts Receivable	869,180	818,358	1,082,203	958,513	946,167	970,833		
Current Year Accounts Receivable	(818,358)	(1,082,203)	(958,513)	(946,167)	(970,833)	(988,854)		
Change in Due from	(335)	-	-	-	-	-		
Change in Accounts Payable	(1,103,974)	(8,396)	(7,976)	(7,577)	(7,198)	(6,838)		
Change in Due to	821,416	(938,466)	-	-	-	-		
Change in Accrued Vacation	-	-	-	-	-	-		
Change in Payroll Liabilities	(16,825)	-	-	-	-	-		
Change in Prepaid Expenditures	(22,759)	(69,012)	(6,737)	(7,074)	(7,427)	(7,799)		
Change in Deposits	-	-	-	-	-	-		
Change in Deferred Revenue	(549,862)	-	-	-	-	-		
Change in Other Long Term Assets	-	-	-	-	-	-		
Change in Other Long Term Liabilities	-	-	-	-	-	-		
Depreciation Expense	801,128	781,037	750,064	745,775	734,229	725,584		
<b>Cash Flow from Investing Activities</b>								
Capital Expenditures	-	-	-	-	-	-		
<b>Cash Flow from Financing Activities</b>								
Source - Sale of Receivables	-	-	-	-	-	-		

**MONSEÑOR OSCAR ROMERO CHARTER SCHOOL**  
*Multi-Year Budget Detail*  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
Use - Sale of Receivables	-	-	-	-	-	-		
Source - Loans	-	-	-	-	-	-		
Use - Loans	(260,975)	(180,424)	(184,066)	(187,781)	(191,571)	(195,438)		
<b>Ending Cash Balance</b>	<b>3,839,081</b>	<b>2,556,608</b>	<b>2,538,585</b>	<b>2,354,797</b>	<b>2,262,861</b>	<b>2,042,999</b>		
Month with Lowest Ending Cash Balance	Jul: \$	Mar: \$1,811,127	Oct: \$2,423,191	Jun: \$2,314,448	Jun: \$2,220,451	Jun: \$1,998,785		
5% Reserve Goal	335,438	367,721	377,428	379,046	390,611	400,424		
Operating Income	549,686	177,670	153,432	6,298	138,927	8,234		
EBITDA	708,337	322,834	294,955	144,105	272,945	138,384		
Net Income as a Percent of Expenses	-3.7%	-8.2%	-7.9%	-9.8%	-7.6%	-9.0%		
Ending Cash as a Percent of Expenses	57.2%	34.8%	33.6%	31.1%	29.0%	25.5%		



**Bert Corona Charter High School**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
Enrollment	210	213	241	255	275	280		
ADA	180.50	195.96	224.13	237.15	255.75	260.40		
ADA %		92%	93%	93%	93%	93%		
UPP		91%	92%	92%	92%	92%		
<b>Income</b>								
<b>8011-8098 · Local Control Funding Formula Sources</b>								
8011 Local Control Funding Formula	2,198,415	2,650,637	3,189,899	3,513,857	3,938,938	4,109,134	54%	21%
8012 Education Protection Account	35,924	39,192	44,826	47,430	51,150	52,080	1%	9%
8019 Local Control Funding Formula - Prior Year	-	-	-	-	-	-	0%	0%
8096 In Lieu of Property Taxes	596,577	650,848	744,410	787,653	849,430	864,874	13%	9%
8098 In Lieu of Property Taxes, Prior Year	-	-	-	-	-	-	0%	0%
<b>Total 8011-8098 · Local Control Funding Formula Sources</b>	<b>2,830,917</b>	<b>3,340,677</b>	<b>3,979,135</b>	<b>4,348,941</b>	<b>4,839,518</b>	<b>5,026,089</b>	<b>68%</b>	<b>18%</b>
<b>8100-8299 · Federal Revenue</b>							0%	
8181 Special Education - Federal (IDEA)	43,939	47,936	54,827	58,012	62,562	63,699	1%	9%
8221 Child Nutrition - Federal	118,254	135,128	152,891	161,773	174,461	177,633	3%	14%
8223 CACFP Supper	-	-	-	-	-	-	0%	0%
8291 Title I	75,757	75,757	75,757	75,757	75,757	75,757	2%	0%
8292 Title II	8,815	8,815	8,815	8,815	8,815	8,815	0%	0%
8294 Title III	4,919	4,805	5,117	5,790	6,126	6,607	0%	-2%
8295 Title IV, SSAE	10,000	10,000	10,000	10,000	10,000	10,000	0%	0%
8296 Title IV, PCSGP	-	-	-	-	-	-	0%	0%
8297 Facilities Incentive Grant	-	-	-	-	-	-	0%	0%
8299 All Other Federal Revenue	615,414	283,636	-	-	-	-	6%	-54%
<b>Total 8100-8299 · Other Federal Income</b>	<b>877,098</b>	<b>566,077</b>	<b>307,407</b>	<b>320,146</b>	<b>337,721</b>	<b>342,511</b>	<b>11%</b>	<b>-35%</b>
<b>8300-8599 · Other State Revenue</b>								
8520 Child Nutrition - State	51,969	47,080	53,268	56,363	60,784	61,889	1%	-9%
8550 Mandate Block Grant	8,476	9,958	11,237	13,275	14,495	15,944	0%	17%
8561 State Lottery - Non Prop 20	30,624	33,313	38,102	40,316	43,478	44,268	1%	9%
8562 State Lottery - Prop 20	12,069	13,129	15,017	15,889	17,135	17,447	0%	9%
8560 Lottery Revenue	42,693	46,443	53,119	56,205	60,613	61,715	1%	9%
8587 State Grant Pass-Through	-	-	-	-	-	-	0%	0%
8591 SB740	-	-	-	-	-	-	0%	0%
8592 State Mental Health	-	-	-	-	-	-	0%	0%
8593 After School Education & Safety	-	-	-	-	-	-	0%	0%
8594 Supplemental Categorical Block Grant	-	-	-	-	-	-	0%	0%
8595 Expanded Learning Opportunity Program	-	-	-	-	-	-	0%	0%
8596 Prop 28 Arts & Music	-	36,185	38,537	43,603	46,136	49,754	1%	

**Bert Corona Charter High School**  
**Multi-Year Budget Detail**  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
8599 State Revenue - Other	180,720	648,455	417,504	250,000	250,000	250,000	13%	259%
<b>Total 8300-8599 · Other State Income</b>	<b>283,858</b>	<b>788,121</b>	<b>573,666</b>	<b>419,446</b>	<b>432,027</b>	<b>439,302</b>	<b>16%</b>	<b>178%</b>
<b>8600-8799 · Other Local Revenue</b>								
8631 Sale of Equipment & Supplies	-	-	-	-	-	-	0%	
8634 Food Service Sales	-	-	-	-	-	-	0%	
8650 Leases & Rentals	-	-	-	-	-	-	0%	
8660 Interest & Dividend Income	-	-	-	-	-	-	0%	
8662 Net Increase (Decrease) in Fair Value of Investments	-	-	-	-	-	-	0%	
8681 Intra-Agency Fee Income	-	-	-	-	-	-	0%	
8682 Childcare & Enrichment Program Fees	-	-	-	-	-	-	0%	
8689 All Other Fees & Contracts	-	-	-	-	-	-	0%	
8692 Grants	-	-	-	-	-	-	0%	
8694 In Kind Donations	-	-	-	-	-	-	0%	
8695 Contributions & Events	12,812	20,000	22,629	23,944	25,822	26,291	0%	56%
8696 Other Fundraising	5,899	-	-	-	-	-	0%	-100%
8697 E-Rate	2,189	-	-	-	-	-	0%	-100%
8698 SELPA Grants	47,400	25,000	20,000	20,000	20,000	20,000	1%	-47%
8699 All Other Local Revenue	21,600	10,000	10,000	10,000	10,000	10,000	0%	-54%
8792 Transfers of Apportionments - Special Education	175,798	191,790	219,361	232,103	250,308	254,859	4%	9%
<b>Total 8600-8799 · Other Income-Local</b>	<b>265,698</b>	<b>246,790</b>	<b>271,990</b>	<b>286,047</b>	<b>306,129</b>	<b>311,150</b>	<b>5%</b>	<b>-7%</b>
<b>Prior Year Adjustments</b>								
8999 Other Prior Year Adjustment	(255)	-	-	-	-	-	0%	-100%
<b>Total Prior Year Adjustments</b>	<b>(255)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	<b>-100%</b>
<b>TOTAL INCOME</b>	<b>4,257,315</b>	<b>4,941,664</b>	<b>5,132,198</b>	<b>5,374,580</b>	<b>5,915,395</b>	<b>6,119,051</b>	<b>100%</b>	<b>16%</b>
<b>Expense</b>								
<b>1000 · Certificated Salaries</b>								
1110 Teachers' Salaries	1,087,625	1,193,834	1,241,587	1,291,250	1,342,900	1,396,616	24%	10%
1120 Teachers' Hourly	-	-	-	-	-	-	0%	
1170 Teachers' Salaries - Substitute	-	-	-	-	-	-	0%	
1175 Teachers' Salaries - Stipend/Extra Duty	110,251	133,466	62,202	64,690	67,278	69,969	3%	21%
1211 Certificated Pupil Support - Librarians	-	-	-	-	-	-	0%	
1213 Certificated Pupil Support - Guidance & Counseling	90,659	110,700	115,128	119,733	124,522	129,503	2%	22%
1215 Certificated Pupil Support - Psychologist	53,809	59,321	61,694	64,162	66,728	69,398	1%	10%
1299 Certificated Pupil Support - Other	2,874	-	-	-	-	-	0%	-100%
1300 Certificated Supervisors' & Administrators' Salaries	70,309	136,699	142,167	147,854	153,768	159,919	3%	94%
1900 Other Certificated Salaries	-	-	-	-	-	-	0%	
<b>Total 1000 · Certificated Salaries</b>	<b>1,415,527</b>	<b>1,634,020</b>	<b>1,622,779</b>	<b>1,687,690</b>	<b>1,755,197</b>	<b>1,825,405</b>	<b>33%</b>	<b>15%</b>

**Bert Corona Charter High School**  
**Multi-Year Budget Detail**  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>2000 • Classified Salaries</b>								
2111 Instructional Aide & Other Salaries	92,323	259,095	269,459	280,237	291,447	303,105	5%	181%
2121 After School Staff Salaries	-	-	-	-	-	-	0%	
2131 Classified Teacher Salaries	3,953	-	-	-	-	-	0%	-100%
2200 Classified Support Salaries	-	19,542	20,323	21,136	21,982	22,861	0%	
2300 Classified Supervisors' & Administrators' Salaries	134,018	136,806	142,278	147,969	153,888	160,044	3%	2%
2400 Classified Office Staff Salaries	270,562	342,372	323,298	336,230	349,679	363,666	7%	27%
2900 Other Classified Salaries	49,131	47,296	49,188	51,155	53,201	55,329	1%	-4%
<b>Total 2000 • Classified Salaries</b>	<b>549,986</b>	<b>805,110</b>	<b>804,546</b>	<b>836,728</b>	<b>870,197</b>	<b>905,005</b>	<b>16%</b>	<b>46%</b>
<b>3000 • Employee Benefits</b>								
3111 STRS - State Teachers Retirement System	262,143	312,098	309,951	322,349	335,243	348,652	6%	19%
3212 PERS - Public Employee Retirement System	-	-	-	-	-	-	0%	
3213 PARS - Public Agency Retirement System	-	-	-	-	-	-	0%	
3311 OASDI - Social Security	34,567	49,917	49,882	51,877	53,952	56,110	1%	44%
3331 MED - Medicare	28,265	35,367	35,196	36,604	38,068	39,591	1%	25%
3401 H&W - Health & Welfare	302,321	399,095	431,022	465,504	502,744	542,964	8%	32%
3501 SUI - State Unemployment Insurance	9,254	1,220	1,214	1,262	1,313	1,365	0%	-87%
3601 Workers' Compensation Insurance	-	-	-	-	-	-	0%	
3751 OPEB, Active Employees	-	-	-	-	-	-	0%	
3901 Other Retirement Benefits	6,955	8,051	8,045	8,367	8,702	9,050	0%	16%
3902 Other Benefits	361	-	-	-	-	-	0%	-100%
<b>Total 3000 • Employee Benefits</b>	<b>643,865</b>	<b>805,747</b>	<b>835,310</b>	<b>885,963</b>	<b>940,022</b>	<b>997,733</b>	<b>16%</b>	<b>25%</b>
<b>4000 • Supplies</b>								
4111 Core Curricula Materials	48,100	55,900	65,740	71,848	79,955	83,851	1%	16%
4211 Books & Other Reference Materials	10,500	10,500	12,348	13,496	15,018	15,750	0%	0%
4311 Student Materials	34,872	34,872	41,011	44,821	49,878	52,308	1%	0%
4351 Office Supplies	8,400	8,400	9,879	10,796	12,015	12,600	0%	0%
4371 Custodial Supplies	4,000	4,800	5,645	6,169	6,866	7,200	0%	20%
4391 Food (Non Nutrition Program)	9,700	12,500	14,700	16,066	17,879	18,750	0%	29%
4392 Uniforms	23,250	13,250	15,582	17,030	18,952	19,875	0%	-43%
4393 PE & Sports Equipment	7,500	2,500	2,940	3,213	3,576	3,750	0%	-67%
4395 Before & After School Program Supplies	-	-	-	-	-	-	0%	
4399 All Other Supplies	20,750	17,250	20,287	22,171	24,673	25,875	0%	-17%
4390 Other Supplies	61,200	45,500	53,510	58,481	65,079	68,250	1%	-26%
4411 Non Capitalized Equipment	66,750	62,750	73,796	80,652	89,752	94,126	1%	-6%
4711 Nutrition Program Food & Supplies	156,224	136,834	155,596	165,458	179,327	183,501	3%	-12%
4713 CACFP Supper Food & Supplies	-	-	-	-	-	-	0%	

**Bert Corona Charter High School**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
<b>Total 4000 · Supplies</b>	<b>390,046</b>	<b>359,556</b>	<b>417,525</b>	<b>451,721</b>	<b>497,890</b>	<b>517,586</b>	<b>7%</b>	<b>-8%</b>
<b>5000 · Operating Services</b>								
5211 Travel & Conferences	5,549	5,549	6,526	7,132	7,937	8,324	0%	0%
5311 Dues & Memberships	8,571	8,571	10,080	11,017	12,260	12,857	0%	0%
5451 General Insurance	-	-	-	-	-	-	0%	
5511 Utilities	-	-	-	-	-	-	0%	
5521 Security Services	-	-	-	-	-	-	0%	
5531 Housekeeping Services	614	1,200	1,411	1,542	1,716	1,800	0%	96%
5599 Other Facility Operations & Utilities	1,967	2,000	2,352	2,571	2,861	3,000	0%	2%
5611 School Rent - Private Facility	-	-	-	-	-	-	0%	
5613 School Rent - Prop 39	176,122	220,000	258,728	282,764	314,669	330,002	5%	25%
5619 Other Facility Rentals	9,352	12,000	14,112	15,423	17,164	18,000	0%	28%
5621 Equipment Lease	10,000	12,300	14,465	15,809	17,593	18,450	0%	23%
5631 Vendor Repairs	441	400	470	514	572	600	0%	-9%
5812 Field Trips & Pupil Transportation	21,135	30,340	35,681	38,996	43,396	45,510	1%	44%
5821 Legal	-	-	-	-	-	-	0%	
5823 Audit	-	-	-	-	-	-	0%	
5831 Advertisement & Recruitment	46,000	45,000	52,922	57,838	64,364	67,500	1%	-2%
5841 Contracted Substitute Teachers	90,000	71,100	83,616	91,384	101,695	106,651	1%	-21%
5842 Special Education Services	132,391	120,000	141,124	154,235	171,638	180,001	2%	-9%
5843 Non Public School	-	-	-	-	-	-	0%	
5844 After School Services	-	-	-	-	-	-	0%	
5849 Other Student Instructional Services	2,588	-	-	-	-	-	0%	-100%
5852 PD Consultants & Tuition	29,925	18,725	22,021	24,067	26,783	28,088	0%	-37%
5854 Nursing & Medical (Non-IEP)	5,000	2,000	2,352	2,571	2,861	3,000	0%	-60%
5859 All Other Consultants & Services	73,020	70,020	81,466	88,570	97,999	102,531	1%	-4%
5861 Non Instructional Software	41,913	44,748	52,625	57,514	64,004	67,123	1%	7%
5865 Fundraising Cost	-	2,000	-	-	-	-	0%	
5871 District Oversight Fees	28,309	33,407	39,791	43,489	48,395	50,261	1%	18%
5872 Special Education Fees (SELPA)	43,947	47,945	54,837	58,023	62,574	63,712	1%	9%
5881 Intra-Agency Fees	438,041	457,129	486,506	499,070	521,250	528,053	9%	4%
5895 Bad Debt Expense	-	-	-	-	-	-	0%	
5898 Uncategorized Expense	2,472	2,583	3,038	3,320	3,695	3,875	0%	4%
5899 All Other Expenses	7,000	7,000	8,232	8,997	10,012	10,500	0%	0%
5911 Office Phone	919	960	1,129	1,234	1,373	1,440	0%	4%
5913 Mobile Phone	16,188	16,200	16,838	17,392	17,947	18,485	0%	0%
5921 Internet	8,867	9,133	9,493	9,805	10,118	10,422	0%	3%

**Bert Corona Charter High School**  
 Multi-Year Budget Detail  
 Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
5923 Website Hosting	3,067	2,200	2,287	2,362	2,437	2,510	0%	-28%
5931 Postage & Shipping	1,176	1,212	1,259	1,301	1,342	1,383	0%	3%
5999 Other Communications	1,000	1,030	1,071	1,106	1,141	1,175	0%	3%
<b>Total 5000 · Operating Services</b>	<b>1,205,575</b>	<b>1,244,752</b>	<b>1,404,434</b>	<b>1,498,047</b>	<b>1,627,796</b>	<b>1,685,253</b>	<b>25%</b>	<b>3%</b>
<b>6000 · Capital Outlay</b>								
6901 Depreciation Expense	43,727	39,111	4,559	2,722	121	-	1%	-11%
6911 Amortization Expense - Lease Assets	-	-	-	-	-	-	0%	
6912 Amortization Expense - Other	-	-	-	-	-	-	0%	
6999 Capital Outlay	-	-	-	-	-	-	0%	
<b>Total 6000 · Capital Outlay</b>	<b>43,727</b>	<b>39,111</b>	<b>4,559</b>	<b>2,722</b>	<b>121</b>	<b>-</b>	<b>1%</b>	<b>-11%</b>
<b>7000 · Other Outgo</b>								
7438 Interest Expense	-	-	-	-	-	-	0%	
<b>Total 7000 · Other Outgo</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>	
<b>TOTAL EXPENSE</b>	<b>4,248,727</b>	<b>4,888,298</b>	<b>5,089,153</b>	<b>5,362,870</b>	<b>5,691,223</b>	<b>5,930,982</b>	<b>100%</b>	<b>15%</b>
<b>NET INCOME</b>	<b>8,589</b>	<b>53,366</b>	<b>43,045</b>	<b>11,710</b>	<b>224,172</b>	<b>188,070</b>		
<b>Beginning Cash Balance</b>	760,629	666,673	197,082	176,758	175,902	327,133		
<b>Cash Flow from Operating Activities</b>								
Net Income	8,589	53,366	43,045	11,710	224,172	188,070		
Change in Accounts Receivable								
Prior Year Accounts Receivable	320,592	685,153	531,557	584,951	586,101	645,386		
Current Year Accounts Receivable	(685,153)	(531,557)	(584,951)	(586,101)	(645,386)	(644,198)		
Change in Due from	136	-	-	-	-	-		
Change in Accounts Payable	(25,167)	(11,822)	(11,231)	(10,669)	(10,136)	(9,629)		
Change in Due to	652,647	(648,455)	-	-	-	-		
Change in Accrued Vacation	(1)	-	-	-	-	-		
Change in Payroll Liabilities	(5,894)	-	-	-	-	-		
Change in Prepaid Expenditures	(4,053)	(33,833)	(3,303)	(3,468)	(3,641)	(3,823)		
Change in Deposits	-	-	-	-	-	-		
Change in Deferred Revenue	(394,698)	-	-	-	-	-		
Change in Other Long Term Assets	-	-	-	-	-	-		
Change in Other Long Term Liabilities	-	-	-	-	-	-		
Depreciation Expense	43,748	39,111	4,559	2,722	121	-		
<b>Cash Flow from Investing Activities</b>								
Capital Expenditures	(4,702)	-	-	-	-	-		
<b>Cash Flow from Financing Activities</b>								
Source - Sale of Receivables	-	-	-	-	-	-		

**Bert Corona Charter High School**

*Multi-Year Budget Detail*

Prepared by ExED. For use by ExED and ExED clients only. © 2023 ExED

	-1	0	1	2	3	4		
	2022-23	2023-24 Trend	2024-25	2025-26	2026-27	2027-28	2023-24 Percent of Budget	Percent Change, 2022-23 to 2023-24
Use - Sale of Receivables	-	-	-	-	-	-		
Source - Loans	-	-	-	-	-	-		
Use - Loans	-	-	-	-	-	-		
<b>Ending Cash Balance</b>	666,673	218,636	176,758	175,902	327,133	502,937		
Month with Lowest Ending Cash Balance	Jul: \$	Mar: (\$ 19,233)	Oct: (\$ 164,972)	Oct: (\$ 62,330)	Oct: (\$ 75,740)	Jul: \$108,102		
5% Reserve Goal	212,436	244,415	254,458	268,143	284,561	296,549		
Operating Income	52,316	92,478	47,604	14,432	224,293	188,070		
EBITDA	52,316	92,478	47,604	14,432	224,293	188,070		
Net Income as a Percent of Expenses	0.2%	1.1%	0.8%	0.2%	3.9%	3.2%		
Ending Cash as a Percent of Expenses	15.7%	4.5%	3.5%	3.3%	5.7%	8.5%		



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

**SUBJECT: Recommendation to approve 2023-2024 budgets for Bert Corona Charter School, Bert Corona Charter High School, and Monseñor Oscar Romero Charter School.**

### BACKGROUND

As per the California State Constitution, the legislature, Assembly & Senate, must pass the Budget Bill by June 15<sup>th</sup> of each year. If the Budget Bill is not passed by this date, the legislators are unpaid until they reach an agreement. Once passed, the bill moves on to the Governor for signing. The Governor decides to either sign or veto the Budget Bill.

### ANALYSIS

As required by law, the legislature sent the final budget to the Governor by June 15, 2023.

### RECOMMENDATION

It is recommended that the Board of Directors approve the 2023-2024 budgets for Bert Corona Charter School, Bert Corona Charter High School, and Monseñor Oscar Romero Charter School.

# Coversheet

## Recommendation to approve the Education Protection Act Spending Resolutions for 2023-2024

**Section:** V. Items Scheduled For Action  
**Item:** G. Recommendation to approve the Education Protection Act Spending Resolutions for 2023-2024  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** MORCS EPA FY23-24 Spending Plan.pdf  
BCCS EPA FY23-24 Spending Plan.pdf  
BCCHS EPA FY23-24 Spending Plan.pdf





## YPI Charter Schools, Inc FY 2023-24 Education Protection Account Spending Plan

California created the Education Protection Account (EPA) in November 2012 after the passage of Proposition 30, *The Schools and Local Public Safety Protection Act of 2012*. Proposition 30 temporarily increased the personal income tax rates for upper-income taxpayers and the sales tax rate for all taxpayers. The .25 sales tax increase expired in 2016. The income tax increase was set to expire in 2018 but was extended by voters through 2030 via Proposition 55 in November 2016.

Revenue generated from the increased taxes is deposited into the EPA and distributed to districts and charter schools every quarter.

While funds from the EPA are part of a district's or charter school's general-purpose funding, Proposition 30 specifies that EPA funds may not be used for administrative salaries or benefits or any other administrative costs. **Governing boards must annually determine the use of EPA funds at an open public meeting.**

Proposition 30 also requires all districts, counties, and charter schools to report on their websites an accounting of how much money was received from the EPA and how that money was spent.

For schools open before FY13/14, EPA funds are estimated to roughly equal 45% of a school's FY12/13 funding rate multiplied by the current year Average Daily Attendance.

**For Monsenor Oscar Romero Charter, this equates to \$39,192.**

Funds will be used to support teacher salaries and benefits.



## YPI Charter Schools, Inc FY 2023-24 Education Protection Account Spending Plan

California created the Education Protection Account (EPA) in November 2012 after the passage of Proposition 30, *The Schools and Local Public Safety Protection Act of 2012*. Proposition 30 temporarily increased the personal income tax rates for upper-income taxpayers and the sales tax rate for all taxpayers. The .25 sales tax increase expired in 2016. The income tax increase was set to expire in 2018 but was extended by voters through 2030 via Proposition 55 in November 2016.

Revenue generated from the increased taxes is deposited into the EPA and distributed to districts and charter schools every quarter.

While funds from the EPA are part of a district's or charter school's general-purpose funding, Proposition 30 specifies that EPA funds may not be used for administrative salaries or benefits or any other administrative costs. **Governing boards must annually determine the use of EPA funds at an open public meeting.**

Proposition 30 also requires all districts, counties, and charter schools to report on their websites an accounting of how much money was received from the EPA and how that money was spent.

For schools open before FY13/14, EPA funds are estimated to roughly equal 45% of a school's FY12/13 funding rate multiplied by the current year Average Daily Attendance.

**For Bert Corona Charter, this equates to \$778,227.**

Funds will be used to support teacher salaries and benefits.



## YPI Charter Schools, Inc

### FY 2023-24 Education Protection Account Spending Plan

California created the Education Protection Account (EPA) in November 2012 after the passage of Proposition 30, *The Schools and Local Public Safety Protection Act of 2012*. Proposition 30 temporarily increased the personal income tax rates for upper-income taxpayers and the sales tax rate for all taxpayers. The .25 sales tax increase expired in 2016. The income tax increase was set to expire in 2018 but was extended by voters through 2030 via Proposition 55 in November 2016.

Revenue generated from the increased taxes is deposited into the EPA and distributed to districts and charter schools every quarter.

While funds from the EPA are part of a district's or charter school's general-purpose funding, Proposition 30 specifies that EPA funds may not be used for administrative salaries or benefits or any other administrative costs. **Governing boards must annually determine the use of EPA funds at an open public meeting.**

Proposition 30 also requires all districts, counties, and charter schools to report on their websites an accounting of how much money was received from the EPA and how that money was spent.

For schools open before FY13/14, EPA funds are estimated to roughly equal 45% of a school's FY12/13 funding rate multiplied by the current year Average Daily Attendance.

**For Bert Corona Charter High, this equates to \$673,313.**

Funds will be used to support teacher salaries and benefits.

# Coversheet

## Recommendation to approve services with Ring Central

**Section:** V. Items Scheduled For Action  
**Item:** H. Recommendation to approve services with Ring Central  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 8a. 22-23 Recommendation to approve VOIP phone contract.pdf  
8b. YPI Charter Schools\_RingCentral Quote - Sheet1 (1).pdf



**TO:** YPI Charter Schools Board of Directors

**FROM:** Ryan Bradford, YPICS Director of Technology and Integration

**DATE:** 6/26/23

**SUBJECT:** Recommendation to approve VOIP contract with RingCentral

## **BACKGROUND**

Board Member Dean Cho tasked the YPICS Tech Committee last fall to evaluate and look at moving to a new communications platform. Currently YPICS has several different platforms that staff use to communicate with various stakeholders. A challenge that we face with our current VOIP provider is that they require us to have a physical device at Bert Corona Charter School. With the current platform staff also does not have the ability to send SMS and MMS messages to parents. The current platform is also not fully deployed at Bert Corona Charter High School due to the high cost per line.

The goal of moving to one platform was to simplify our communication platforms by moving to a cloud based system, reduce annual costs, and expand our VOIP phones to Bert Corona Charter High School.

## **ANALYSIS**

During the second semester Mr. Dueans and Mr. Bradford met with three different VOIP providers. After meeting with all three vendors an analysis was conducted using the criteria below.

- Overall cost of agreement
- Feature set of platform
- Depth of onboarding and implementation support

- Level of change that staff would be faced with
- Feedback provided by Board Member Dean Cho

After analyzing all three platforms and quotes it was decided that RingCentral would be a great fit for YPICS. RingCentral has a competitive cost, strong feature set, robust onboarding and implementation support, and was recommended by Board Member Cho.

RingCentral's cost was competitive with the other two quotes we received. What sets RingCentral apart from the other platform's cost is that they are offering us four free months of service credits to get started. These four months of service credits will help reduce our implementation costs by almost 50%.

All three vendors had similar feature sets but RingCentral stood out because of their integration with Google Workspace. We believe that the integration with Google Workspace will help with staff adoption of the platform since our staff works daily in Google Workspace. The Google Workspace integration will also help reduce the amount of work that the YPICS tech team has to do to deploy a new phone number.

One of the items that Board Member Cho wanted us to consider in making our decision was the level of onboarding, implementation, and ongoing support that a provider offers. RingCentral has a robust onboarding and implementation process with a dedicated implementation team to support us. Their team will help us with porting over our current phone numbers, building out the backend of the new platform, and user training for the tech team and non tech staff. We also will have a dedicated customer service representative and 24/7/365 tech support from their team.

## **RECOMMENDATION**

It is recommended that the Board of Directors approve the 5 year agreement with RingCentral. By moving to RingCentral we will be able to accomplish all of our goals for simplifying our communications platform.

**Attachment:** RingCentral 5 Year Quote



Company Name YPI CS  
 Date 5/16/2023  
 Quote Expiration 6/16/2023  
 Contract Length 60 Months  
 Payment Budgetary  
 Quote Status Approved  
 Free Service Credits 3

Monthly Recurring Service Costs					
RingCentral MVP	User Count	List Price	Discount Amount	Adjusted Price	Total Cost
RingCentral EDU Standard MVP (Message/Video/Phone/SMS/Fax)	49	\$19.99	\$9.00	\$10.99	\$538.51
RingCentral EDU Secondary Lines (Teachers Only)	51	\$19.99	\$13.00	\$6.99	\$356.49
RingCentral Digital Line Basic (Dialtone & Physical Phone only)	0	\$13.99	\$9.00	\$4.99	\$0.00
e911	100	\$1.00	\$0.00	\$1.00	\$100.00
Compliance and Administrative Cost Recovery Fee (CRF)	100	\$4.00	\$0.00	\$4.00	\$400.00
Additional Local Numbers	1	\$4.99	\$3.00	\$1.99	\$1.99
Monthly Recurring Service Costs					\$1,396.99
Hardware Rental (If applicable)					\$0.00
Monthly Total					\$1,396.99
<b>Annual Total</b>					<b>\$16,763.88</b>
60 month contract, annual payment					

Hardware Rental	Phone Count	Rental Price	Discount	Adjusted Price	Total Cost
Poly VVX 450	0	\$9.50	\$4.66	\$4.85	\$0.00
Poly VVX 350	0	\$8.00	\$3.92	\$4.08	\$0.00
Poly VVX 150	0	\$4.50	\$2.21	\$2.30	\$0.00
Poly Obi 302 ATA	0	\$4.50	\$2.21	\$2.30	\$0.00
<b>Monthly Hardware Rental Cost</b>					<b>\$0.00</b>

Implementation	Phone Count	Purchase Price	Discount	Adjusted Price	Total Cost
UC Remote Implementation	100	\$56.70	\$0	\$56.70	\$5,670.00
Core Site Build (3 locations)	3	\$360.00	\$0	\$360.00	\$1,080.00
Instructor Led Training - End User (1 hr)	1	\$360.00	\$0	\$360.00	\$360.00
Instructor Led Training - Admin (2 hrs)	1	\$720.00	\$0	\$720.00	\$720.00
Overhead Paging Integration (Poly ATA, Algo, or equivalent)	3	\$540.00	\$0	\$540.00	\$1,620.00
<b>Total Professional Services Cost</b>					<b>\$9,450.00</b>

Order Summary	
Total Annual Recurring Cost	\$16,763.88
Total Non-Recurring Charges	\$9,450.00
3 Free Service Credits	\$4,667.94

\* Does not include costs for Federal universal or State and Local taxes

\* Pricing is in USD

\* 60 month term with Annual Payment

\*\* BUDGETARY PRICING ONLY \*\*

# Coversheet

## Recommendation to Approve Hourly Staff Pay Schedule and Administrative Team Salary Table

**Section:** V. Items Scheduled For Action  
**Item:** I. Recommendation to Approve Hourly Staff Pay Schedule and  
Administrative Team Salary Table  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 9a. Hourly Staff Pay Schedule.pdf  
9b. Adminstrative Team Salary Table.pdf



Position	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
<b>Operations</b>															
Meal Server	\$17.12	\$17.46	\$17.81	\$18.16	\$18.53	\$18.90	\$19.27	\$19.66	\$20.05	\$20.45	\$20.86				
Meal Program Assistant	\$17.20	\$17.63	\$18.07	\$18.52	\$18.99	\$19.46	\$19.95	\$20.44	\$20.96	\$21.48	\$22.02				
Custodian	\$17.86	\$18.40	\$18.95	\$19.52	\$20.10	\$20.70	\$21.33	\$21.97	\$22.62	\$23.30	\$24.00	\$24.72	\$25.46	\$26.23	\$27.02
Office Assistant	\$18.57	\$19.12	\$19.70	\$20.29	\$20.90	\$21.52	\$22.17	\$22.83	\$23.52	\$24.22	\$24.95	\$25.70	\$26.47		
Parent Coordinator	\$23.93	\$24.41	\$24.90	\$25.39	\$25.90	\$26.42	\$26.95	\$27.34	\$28.16	\$29.00	\$62,400				
Program Coordinator	\$23.93	\$24.41	\$24.90	\$25.39	\$26.41	\$27.47	\$28.56	\$29.71	\$62,400	\$63,200	\$65,096				
<b>School Culture and Climate</b>															
Supervision Aide	\$17.69	\$18.04	\$18.40	\$18.77	\$19.14	\$19.53									
Supervision- Lead	\$20.16	\$20.76	\$21.38	\$22.03	\$22.69	\$23.37	\$24.07								
SCC Assistant	\$20.16	\$20.76	\$21.38	\$22.03	\$22.69	\$23.37	\$24.07	\$24.79	\$25.53	\$26.30					
SCC Manager	\$22.89	\$23.35	\$23.81	\$24.29	\$25.02	\$25.77	\$26.54	\$27.34	\$28.16	\$29.00	\$62,400	\$63,200	\$65,096		
<b>Academics</b>															
Tutor- General Education	\$19.10	\$19.67	\$20.26	\$20.87	\$21.49	\$22.14	\$22.80								
Tutor- Special Education	\$20.16	\$20.76	\$21.38	\$22.03	\$22.69	\$23.37	\$24.07	\$24.79	\$25.53						
Tutor- BII Assistant	\$21.22	\$21.85	\$22.51	\$23.19	\$23.88	\$24.60	\$25.34	\$26.10	\$26.88						
Tutor- Lead	\$21.75	\$22.40	\$23.07	\$23.77	\$24.48	\$25.21	\$25.97	\$26.49	\$27.02						
<b>Learning and Support Center</b>															
Information Technology Technician	\$18.73	\$19.10	\$19.48	\$19.87	\$20.27	\$20.88	\$21.71	\$22.58	\$23.49	\$24.43	\$25.00	\$25.00			
Office Assistant- Records	\$18.73	\$19.10	\$19.87	\$20.66	\$21.49	\$22.35	\$23.24	\$23.94	\$24.42	\$25.03	\$25.78	\$26.55	\$27.35	\$28.17	\$29.01
Clerk- Human Resources/Accounts Payable	\$22.88	\$23.57	\$24.28	\$25.00	\$25.75	\$26.52	\$27.32	\$28.14	\$28.98	\$29.85	\$62,400	\$63,200			

Coordinator		L1	L2	L3	L4	L5	L6	L7	L8	L9	L10
Classified	No Degree	\$71,500	\$73,500	\$75,000	\$78,000	\$80,500	\$83,000	\$85,500	\$88,000	\$91,000	\$93,500
Classified	W/Degree	\$80,500	\$83,500	\$85,500	\$88,000	\$91,000	\$93,500	\$96,000	\$98,750	\$100,000	\$103,500
Certificated		\$92,250	\$95,000	\$97,850	\$100,000	\$103,000	\$106,000	\$109,000	\$112,000	\$115,000	\$118,500
Director		L1	L2	L3	L4	L5	L6	L7	L8	L9	L10
Director	Classified	\$94,000	\$96,000	\$99,000	\$101,000	\$104,000	\$107,000	\$110,000	\$113,000	\$116,000	\$119,000
Director	Certificated	\$108,000	\$110,000	\$113,000	\$116,000	\$119,000	\$122,000	\$125,000	\$128,000	\$131,000	\$134,000
Senior Director		\$120,000	\$123,000	\$126,000	\$129,000	\$132,000	\$135,000	\$138,000	\$141,000	\$144,000	\$148,000
Executive Administrator		\$132,000	\$134,000	\$137,000	\$141,000	\$143,000	\$145,000	\$149,000	\$153,000	\$157,000	\$161,000

# Coversheet

## Recommendation to Approve Board Resolution to Renew MORCS

**Section:** V. Items Scheduled For Action  
**Item:** J. Recommendation to Approve Board Resolution to Renew MORCS  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
10. Board Resolution Number 2023-0626-01 Monsenor Charter Renewal Submission.doc.pdf



Resolution Number: 2023-0626-01

RESOLUTION  
OF THEE  
BOARD OF DIRECTORS OF  
YPI CHARTER SCHOOLS, INC.  
A California Nonprofit Public Benefit Corporation

**Monseñor Oscar Romero Charter School Renewal Petition**

We, the Board of Directors of YPI Charter Schools, Inc., a California nonprofit public benefit corporation, hereby consent to and adopt the following Resolution:

Whereas, it is time to renew the Monseñor Oscar Romero Charter School (MORCS) Petition the YPI Charter Schools (YPICS) Board of Directors do hereby consent to the adoption of the following:

Assign **Yvette King-Berg, YPICS Executive Director** as the **Lead Petitioner** to submit the Monseñor Oscar Romero Charter School Renewal Petition. **Freddy Zepeda, Executive Administrator**, and **Paul Duran, Director of Instruction**, will serve as the on-site Business Manager for MORCS.

Additionally, it is resolved, that the corporation shall:

Continue to use EXED as the YPI Charter School’s back-office provider. Additionally, it is the desire of the YPICS board to move to approve the completed Monseñor Oscar Romero Charter School Petition move forward.

The officers of this corporation are authorized to perform the acts to carry out this resolution.

**CERTIFICATE OF SECRETARY**

The Secretary of the Corporation certifies that the above is a true and correct copy of the resolution that was duly adopted at a meeting of the dated meeting of the Board of Directors.

I, the undersigned, being all the directors of this corporation consent and agree that the following corporate resolution was made:

On Monday, June 26, 2023, at 6:00 PM, at 10660 White Oak Avenue, Granada Hills, CA 91344.

\_\_\_\_\_  
Signature of Secretary

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name of Secretary

## Coversheet

### Recommendation to Return 6M to PWB, Place 3M into Sweep Account and 3M into a 13-month CD

**Section:** V. Items Scheduled For Action  
**Item:** K. Recommendation to Return 6M to PWB, Place 3M into Sweep Account and 3M into a 13-month CD  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 11a. Recommendation to approve Returning to PWB.pdf  
11b. latesLAS (1).pdf  
11c. PacWest 10-Q 1st Quarter 2023 -5-10-23 (1).pdf  
11d. ICS - Description (1).pdf



## YPI CHARTER SCHOOLS

June 26, 2023

**TO:** YPI Charter Schools  
Board of Directors

**FROM:** Yvette King-Berg  
Executive Director

### **Recommendation to approve continued membership in Charter Schools Development Center**

#### **BACKGROUND**

The Charter Schools Development Center was established in 2004 as a membership & business development, and advocacy organization serving charter school developers and California Charter School Leaders as well.

#### **ANALYSIS**

The membership dues have remained at \$3.00 per student. The fee has not changed since the organization began.

#### **RECOMMENDATION**

It is recommended that the Board of Directors approve continued membership in the Charter Schools Development Center at a cost of \$3.00 per student and an approximate total cost of \$2,523.00 for FY2024 only with future and continued membership (and fees) to be determined by the board.

**Attachment:** *CSDC Membership Invoice FY 2024*



**PACIFIC WESTERN BANK  
 LOCAL AGENCY SECURITY PROGRAM  
 WEEKLY CALL REPORT CERTIFICATION  
 WEEKLY AS OF DATE: June 14, 2023**

**Pool # 1  
 110%**

Total Deposits & Accrued Interest	\$ 313,578,929.96
CDARS Program Deposits from Other Institutions	68,439,944.65
Total Deposits & Accrued Interest	<u>382,018,874.61</u>
Less Waivers	23,512,474.71
Less Interest	81,616.26
Less Uncollected Funds	1,018.84
Less CDARS Program Deposits from Other Institutions	68,439,944.65
Total Secured Deposit	<u><u>\$ 289,983,820.15</u></u>
Minimum Collateral Required	\$ 318,982,202.17
Market Value of Pledged Securities	\$504,440,023.17
Excess/(Deficiency) in Pledged Collateral	\$ 185,457,821.00

As of:

6/14/2023

CUSIP	Description	Par Value	Coupon	Maturity	Call Date	Call Price	Price Date	Mkt Price	Market Value
235308E1	DALLAS TEX INDPT SCH DIST	10,000,000.00	1.94	8/15/2030 (NULL)	(NULL)	(NULL)	6/9/2023	85.52	8,552,100.40
235308E8	DALLAS TEX INDPT SCH DIST	7,500,000.00	2.01	8/15/2031 (NULL)	(NULL)	(NULL)	6/9/2023	84.24	6,317,924.85
014464XG1	ALEDO TEX INDPT SCH DIST	4,000,000.00	4.00	2/15/2045 2/15/2029	100	100	6/9/2023	98.05	3,922,040.12
041796XV0	ARLINGTON TEX	8,265,000.00	1.90	8/15/2034 (NULL)	(NULL)	(NULL)	6/9/2023	76.52	6,324,708.77
05914F8J2	BALTIMORE CNTY MD	8,705,000.00	4.00	3/1/2042 3/1/2031	100	100	6/9/2023	100.62	8,759,319.29
05914F8L7	BALTIMORE CNTY MD	9,235,000.00	4.00	3/1/2044 3/1/2031	100	100	6/9/2023	100.24	9,257,071.47
139015RN3	CANYON TEX INDPT SCH DIST	5,720,000.00	4.00	2/15/2037 2/15/2030	100	100	6/9/2023	101.08	5,781,604.57
139015RP8	CANYON TEX INDPT SCH DIST	5,955,000.00	4.00	2/15/2038 2/15/2030	100	100	6/9/2023	100.48	5,983,822.28
14052TDK7	CAPITAL TR AGR FLA MULTIFAMILYREV	9,953,176.20	2.95	1/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	94.85	8,588,559.95
1812345T1	CLARK CNTY WASH MULTIFAMILYREV	30,000,000.00	4.00	12/1/2038 6/1/2030	100	100	6/9/2023	100.81	30,243,299.10
1998205R8	COMAL TEX INDPT SCH DIST	7,805,000.00	4.00	2/1/2042 2/1/2031	100	100	6/9/2023	100.40	7,836,610.17
1998205S6	COMAL TEX INDPT SCH DIST	6,500,000.00	4.00	2/1/2043 2/1/2031	100	100	6/9/2023	100.14	6,508,775.13
232769GJ2	CYPRESS-FAIRBANKS TEX INDPT SCH DIST	6,500,000.00	3.00	2/15/2036 2/15/2030	100	100	6/9/2023	92.94	6,040,839.81
232769GK9	CYPRESS-FAIRBANKS TEX INDPT SCH DIST	13,500,000.00	3.00	2/15/2037 2/15/2030	100	100	6/9/2023	90.59	12,229,649.46
2390193Q3	DAVIS CNTY UTAH SCH DIST	2,335,000.00	3.00	6/1/2034 6/1/2029	100	100	6/9/2023	94.51	2,206,831.80
2390193R1	DAVIS CNTY UTAH SCH DIST	2,405,000.00	3.00	6/1/2035 6/1/2029	100	100	6/9/2023	92.12	2,215,437.80
2390193S9	DAVIS CNTY UTAH SCH DIST	2,475,000.00	3.00	6/1/2036 6/1/2029	100	100	6/9/2023	90.17	2,231,707.45
249020HV1	DENTON TEX INDPT SCH DIST	5,000,000.00	1.78	8/15/2033 8/15/2030	100	100	6/9/2023	77.78	3,889,099.90
249174XW8	DENVER COLO CITY & CNTY SCH DIST NO 1	7,250,000.00	4.00	12/1/2040 12/1/2030	100	100	6/9/2023	100.47	7,284,292.50
24917NAP6	DENVER COLO CITY & CNTY HSG AUTH INTERGO	3,860,000.00	2.89	12/1/2033 (NULL)	(NULL)	(NULL)	6/9/2023	83.26	3,214,028.98
24917NAG4	DENVER COLO CITY & CNTY HSG AUTH INTERGO	4,520,000.00	2.94	12/1/2034 (NULL)	(NULL)	(NULL)	6/9/2023	82.61	3,729,408.94
25476FYT9	DISTRICT COLUMBIA	6,000,000.00	4.00	2/1/2040 2/1/2031	100	100	6/9/2023	98.82	5,917,140.18
378394HN3	GLENDALE CALIF CMNTY COLLEGE DIST	1,100,000.00	-	8/1/2034 2/1/2030	88,788	100	6/9/2023	65.80	723,766.97
4073247N6	HAMILTON CNTY TENN	3,520,000.00	4.00	1/1/2035 1/1/2030	100	100	6/9/2023	105.71	3,720,851.24
4073247P1	HAMILTON CNTY TENN	3,665,000.00	4.00	1/1/2036 1/1/2030	100	100	6/9/2023	104.65	3,835,532.45
423542RY7	HEMET CALIF CNTY SCH DIST	360,000.00	1.85	8/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	81.39	292,986.01
425507LG3	HENNEPIN CNTY MINN	10,915,000.00	5.00	12/15/2039 12/15/2029	100	100	6/9/2023	109.90	11,996,130.64
425507LH1	HENNEPIN CNTY MINN	11,465,000.00	5.00	12/15/2040 12/15/2029	100	100	6/9/2023	109.60	12,565,296.05
476453HB4	JEROME LINCOLN & GOODING CNTYS IDAHO JT	1,000,000.00	1.80	9/15/2033 9/15/2030	100	100	6/9/2023	76.11	761,100.01
476453HC2	JEROME LINCOLN & GOODING CNTYS IDAHO JT	1,000,000.00	1.90	9/15/2034 9/15/2030	100	100	6/9/2023	74.78	747,760.01
476453HD0	JEROME LINCOLN & GOODING CNTYS IDAHO JT	690,000.00	2.00	9/15/2035 9/15/2030	100	100	6/9/2023	73.36	506,163.31
480603D72	KATY TEX INDPT SCH DIST	20,000,000.00	4.00	2/15/2045 2/15/2030	100	100	6/9/2023	99.81	19,922,200.00
49474FG38	KING CNTY WASH	22,075,000.00	1.91	12/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	84.26	18,599,733.63
514034RT8	LANCASTER CNTY NEB SCH DIST NO 001	8,450,000.00	3.00	1/15/2036 7/15/2030	100	100	6/9/2023	92.56	7,794,508.90
54438EFK4	LOS ANGELES CALIF CMNTY REDEV AGRY CMNTY	570,000.00	8.00	6/1/2038 (NULL)	(NULL)	(NULL)	5/31/2023	105.64	602,130.90
544647BW9	LOS ANGELES CALIF UNI SCH DIST	10,000,000.00	4.00	7/1/2040 7/1/2030	100	100	6/9/2023	100.91	10,091,400.10
569203PW6	MARION & POLK CNTYS ORE SCH DIST NO 24J	1,000,000.00	-	6/15/2031 6/15/2030	97,922	100	6/9/2023	75.57	755,650.02
569203PY2	MARION & POLK CNTYS ORE SCH DIST NO 24J	1,050,000.00	-	6/15/2033 6/15/2030	93,037	100	6/9/2023	69.46	729,350.98
569280FB1	MARION CNTY ORE SCH DIST NO 103 WOODBURN	1,000,000.00	1.93	6/15/2030 (NULL)	(NULL)	(NULL)	6/9/2023	83.87	838,679.96
569280FC9	MARION CNTY ORE SCH DIST NO 103 WOODBURN	1,000,000.00	2.03	6/15/2031 (NULL)	(NULL)	(NULL)	6/9/2023	82.48	824,779.97
57582RD52	MASSACHUSETTS ST	5,000,000.00	5.00	7/1/2045 7/1/2030	100	100	6/9/2023	108.34	5,417,050.15
594612EP4	MICHIGAN ST	2,500,000.00	4.00	5/15/2038 5/15/2030	100	100	6/9/2023	101.65	2,541,275.03
594612EP4	MICHIGAN ST	1,500,000.00	4.00	5/15/2038 5/15/2030	100	100	6/9/2023	101.65	1,524,765.02
5978517T5	MIDLOTHIAN TEX INDPT SCH DIST	3,720,000.00	4.00	2/15/2036 2/15/2030	100	100	6/9/2023	101.91	3,791,200.84
604617CA6	MIRACOSTA CALIF CMNTY COLLEGE DIST	12,000,000.00	4.00	8/1/2045 8/1/2030	100	100	6/9/2023	99.46	11,934,600.24
604617CA6	MIRACOSTA CALIF CMNTY COLLEGE DIST	3,500,000.00	4.00	8/1/2045 8/1/2030	100	100	6/9/2023	99.46	3,480,925.07
623040LS9	MOUNT SAN ANTONIO CALIF CMNTY COLLEGE DI	850,000.00	3.00	8/1/2035 8/1/2030	100	100	6/9/2023	84.24	716,014.50
623040LT7	MOUNT SAN ANTONIO CALIF CMNTY COLLEGE DI	760,000.00	3.00	8/1/2036 8/1/2030	100	100	6/9/2023	82.70	628,550.42
623040MG4	MOUNT SAN ANTONIO CALIF CMNTY COLLEGE DI	895,000.00	3.00	8/1/2032 8/1/2030	100	100	6/9/2023	87.32	781,514.00
625482HV9	MULTNOMAH-CLACKAMAS CNTYS ORE SCH DIST N	1,525,000.00	-	6/15/2039 6/15/2029	69,648	100	6/9/2023	49.24	750,879.48
625517NK9	MULTNOMAH CNTY ORE SCH DIST NO 1J PORTLA	17,010,000.00	1.75	6/30/2030 (NULL)	(NULL)	(NULL)	6/9/2023	83.92	14,274,961.76
649791RH5	NEW YORK ST	15,000,000.00	2.05	3/15/2032 3/15/2031	100	100	6/9/2023	80.49	12,073,050.00
720424C40	PIERCE CNTY WASH SCH DIST NO 010 TACOMA	5,000,000.00	4.00	12/1/2037 12/1/2030	100	100	6/9/2023	101.16	5,057,899.85
720424C57	PIERCE CNTY WASH SCH DIST NO 010 TACOMA	5,000,000.00	4.00	12/1/2038 12/1/2030	100	100	6/9/2023	100.92	5,046,049.90
720424C81	PIERCE CNTY WASH SCH DIST NO 010 TACOMA	8,000,000.00	4.00	12/1/2041 12/1/2030	100	100	6/9/2023	99.71	7,976,799.92
720424C99	PIERCE CNTY WASH SCH DIST NO 010 TACOMA	5,500,000.00	4.00	12/1/2042 12/1/2030	100	100	6/9/2023	99.00	5,445,000.00
720577YE9	PIERCE CNTY WASH SCH DIST NO 401 PENINSU	2,800,000.00	4.00	12/1/2037 6/1/2030	100	100	6/9/2023	102.01	2,856,308.06
720611ZD7	PIERCE CNTY WASH SCH DIST NO 403 BETHEL	4,000,000.00	4.00	12/1/2039 12/1/2031	100	100	6/9/2023	101.88	4,067,279.96
736688ML3	PORTLAND ORE CMNTY COLLEGE DIST	1,000,000.00	1.69	6/15/2031 6/15/2030	100	100	6/9/2023	80.89	800,880.00
736688MM1	PORTLAND ORE CMNTY COLLEGE DIST	1,000,000.00	1.79	6/15/2032 6/15/2030	100	100	6/9/2023	79.58	795,800.02
736688MN9	PORTLAND ORE CMNTY COLLEGE DIST	1,000,000.00	1.89	6/15/2033 6/15/2030	100	100	6/9/2023	78.33	783,300.02
80182AAJ8	SANTA CRUZ CNTY CALIF PENSION OBLIG	1,655,000.00	1.81	6/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	83.38	1,379,856.25
829596XL4	SIoux FALLS S D SCH DIST NO 49-5	860,000.00	1.52	8/1/2028 (NULL)	(NULL)	(NULL)	6/9/2023	86.36	742,687.41
829596XN0	SIoux FALLS S D SCH DIST NO 49-5	1,000,000.00	1.90	8/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	84.01	840,080.03
829596XP5	SIoux FALLS S D SCH DIST NO 49-5	1,000,000.00	1.98	8/1/2031 (NULL)	(NULL)	(NULL)	6/9/2023	82.60	826,009.98
833086DE8	SNOHOMISH CNTY WASH	6,945,000.00	1.73	12/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	82.56	5,733,583.58
833086DF5	SNOHOMISH CNTY WASH	7,065,000.00	1.83	12/1/2031 (NULL)	(NULL)	(NULL)	6/9/2023	81.24	5,739,464.63
833136QM9	SNOHOMISH CNTY WASH SCH DIST NO 006 MUKI	6,925,000.00	3.00	12/1/2036 12/1/2029	100	100	6/9/2023	92.28	6,390,528.36
882724WX1	TEXAS ST	20,000,000.00	1.84	10/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	83.71	16,742,999.60
882724WY9	TEXAS ST	10,000,000.00	1.94	10/1/2031 (NULL)	(NULL)	(NULL)	6/9/2023	82.46	8,246,099.90
882724XQ5	TEXAS ST	25,580,000.00	3.00	10/1/2029 (NULL)	(NULL)	(NULL)	6/9/2023	92.01	23,536,925.40
937440DD5	WASHINGTON CLACKAMAS & YAMHILL CNTYS ORE	4,235,000.00	-	8/15/2037 6/15/2027	64,144	100	6/9/2023	63.97	2,266,756.55
937440DR3	WASHINGTON CLACKAMAS & YAMHILL CNTYS ORE	5,470,000.00	-	8/15/2038 6/15/2027	61,161	100	6/9/2023	51.20	2,800,749.40
938429S73	WASHINGTON CNTY ORE SCH DIST NO 48J BEAV	5,700,000.00	-	6/15/2030 6/15/2027	89,506	100	6/9/2023	77.32	4,407,296.94
93974EE79	WASHINGTON ST	11,405,000.00	5.00	2/1/2045 2/1/2030	100	100	6/9/2023	107.78	12,292,308.89
93974EET9	WASHINGTON ST	5,000,000.00	5.00	2/1/2045 2/1/2030	100	100	6/9/2023	107.78	5,388,999.95
93974EKM7	WASHINGTON ST	7,385,000.00	5.00	6/1/2044 6/1/2030	100	100	6/9/2023	108.60	8,020,257.48
93974EKN5	WASHINGTON ST	7,755,000.00	5.00	6/1/2045 6/1/2030	100	100	6/9/2023	108.13	8,385,248.77
93974ELS3	WASHINGTON ST	7,000,000.00	5.00	2/1/2039 2/1/2031	100	100	6/9/2023	110.92	7,764,050.07
93974ELT1	WASHINGTON ST	8,040,000.00	5.00	2/1/2040 2/1/2031	100	100	6/9/2023	110.49	8,883,235.12
946813XQ0	WAYZATA MINN INDPT SCH DIST NO 284	11,395,000.00	1.75	2/1/2031 2/1/2029	100	100	6/9/2023	82.75	9,428,793.09
9523475B4	WEST CONTRA COSTA CALIF UNI SCH DIST	560,000.00	2.12	8/1/2031 (NULL)	(NULL)	(NULL)	6/9/2023	82.75	463,405.59
953107AJ8	WEST HARTFORD CONN	8,000,000.00	1.74	7/1/2030 (NULL)	(NULL)	(NULL)	6/9/2023	83.88	6,710,399.76
953107AK5	WEST HARTFORD CONN	7,000,000.00	1.84	7/1/2031 (NULL)	(NULL)	(NULL)	6/9/2023	82.56	5,778,850.00
<b>Total</b>		<b>542,631,352.40</b>							<b>504,440,023.14</b>

S&P	Date	Moody's	Rating Date	Fitch	Date
AAA	3/31/2021	Aaa	3/30/2021	AAA	3/30/2021
AAA	3/31/2021	Aaa	3/30/2021	AAA	3/30/2021
AAA	3/3/2020	-	-	AAA	3/4/2020
AAA	7/9/2020	Aa1	7/13/2020	AAA	7/23/2020
AAA	2/22/2021	Aaa	2/23/2021	AAA	2/23/2021
AAA	2/22/2021	Aaa	2/23/2021	AAA	2/23/2021
AAA	4/16/2020	-	-	AAA	4/20/2020
AAA	4/16/2020	-	-	AAA	4/20/2020
AA+	12/8/2017	-	-	-	



**UNITED STATES SECURITIES AND EXCHANGE COMMISSION**  
Washington, D.C. 20549

**Form 10-Q**

**QUARTERLY REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

or

**TRANSITION REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

For the quarterly period ended March 31, 2023  
Commission File No. 001-36408

**PACWEST BANCORP**

*(Exact name of registrant as specified in its charter)*

**Delaware**  
*(State of Incorporation)*

**33-0885320**  
*(I.R.S. Employer Identification No.)*

**9701 Wilshire Blvd., Suite 700**  
**Beverly Hills, CA 90212**  
*(Address of Principal Executive Offices, Including Zip Code)*

**(310) 887-8500**  
*(Registrant's Telephone Number, Including Area Code)*

Securities registered pursuant to Section 12(b) of the Act:

**Common Stock, par value \$0.01 per share**  
**Depository Shares, each representing a 1/40th interest**  
**in a share of 7.75% fixed rate reset non-cumulative**  
**perpetual preferred stock, Series A**  
*(Title of Each Class)*

**PACW**

**The Nasdaq Stock Market LLC**

**PACWP**  
*(Trading Symbol)*

**The Nasdaq Stock Market LLC**  
*(Name of Exchange on Which Registered)*

Indicate by check mark whether the registrant (1) has filed all reports required to be filed by Section 13 or 15(d) of the Securities Exchange Act of 1934 during the preceding 12 months (or for such shorter period that the registrant was required to file such reports), and (2) has been subject to such filing requirements for the past 90 days. Yes  No

Indicate by check mark whether the registrant has submitted electronically every Interactive Data File required to be submitted pursuant to Rule 405 of Regulation S-T (§232.405 of this chapter) during the preceding 12 months (or for such shorter period that the registrant was required to submit such files). Yes  No

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer, a smaller reporting company, or an emerging growth company. See the definitions of "large accelerated filer," "accelerated filer," "smaller reporting company," and "emerging growth company" in Rule 12b-2 of the Exchange Act.

- Large accelerated filer
- Accelerated filer
- Non-accelerated filer
- Smaller reporting company
- Emerging growth company
- If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

Indicate by check mark whether the registrant is a shell company (as defined in Rule 12b-2 of the Exchange Act). Yes  No

Indicate by check mark whether the financial statements included in the filings reflects a correction of an error previously issued financial statements):<sup>(1)</sup>  Yes  No

Indicate by check mark whether any of those error corrections are restatements requiring a recovery analysis of incentive-based compensation under the registrant's clawback policies.<sup>(1)</sup>  Yes  No

<sup>(1)</sup> Checkboxes are blank until we are required to have a recovery policy under the applicable Nasdaq listing standard.

As of April 27, 2023, there were 118,036,596 shares of the registrant's common stock outstanding, excluding 2,204,651 shares of unvested restricted stock.

---

**PACWEST BANCORP**  
**MARCH 31, 2023 QUARTERLY REPORT ON FORM 10-Q**  
**TABLE OF CONTENTS**

		<b>Page</b>
<b>PART I. FINANCIAL INFORMATION</b>		
Item 1.	Condensed Consolidated Financial Statements (Unaudited)	<a href="#"><u>5</u></a>
	Condensed Consolidated Balance Sheets (Unaudited)	<a href="#"><u>6</u></a>
	Condensed Consolidated Statements of Earnings (Loss) (Unaudited)	<a href="#"><u>7</u></a>
	Condensed Consolidated Statements of Comprehensive Income (Loss) (Unaudited)	<a href="#"><u>8</u></a>
	Condensed Consolidated Statements of Changes in Stockholders' Equity (Unaudited)	<a href="#"><u>9</u></a>
	Condensed Consolidated Statements of Cash Flows (Unaudited)	<a href="#"><u>11</u></a>
	Notes to Condensed Consolidated Financial Statements (Unaudited)	<a href="#"><u>57</u></a>
Item 2.	Management's Discussion and Analysis of Financial Condition and Results of Operations	<a href="#"><u>90</u></a>
Item 3.	Quantitative and Qualitative Disclosures About Market Risk	<a href="#"><u>93</u></a>
Item 4.	Controls and Procedures	<a href="#"><u>93</u></a>
<b>PART II. OTHER INFORMATION</b>		
Item 1.	Legal Proceedings	<a href="#"><u>93</u></a>
Item 1A.	Risk Factors	<a href="#"><u>93</u></a>
Item 2.	Unregistered Sales of Equity Securities and Use of Proceeds	<a href="#"><u>95</u></a>
Item 6.	Index to Exhibits	<a href="#"><u>96</u></a>
	Signatures	<a href="#"><u>97</u></a>

**PART I**

**Glossary of Acronyms, Abbreviations, and Terms**

The acronyms, abbreviations, and terms listed below are used in various sections of this Form 10-Q, including "Item 1. Financial Statements" and "Item 2. Management's Discussion and Analysis of Financial Condition and Results of Operations."

ACL	Allowance for Credit Losses	FRBSF	Federal Reserve Bank of San Francisco
AFS	Available-for-Sale	GDP	Gross Domestic Product
AFX	American Financial Exchange	HOA Business	Homeowners Association Services Division of MUFJG Union Bank, N.A. (a business acquired on October 8, 2021)
ALLL	Allowance for Loan and Lease Losses	HTM	Held-to-Maturity
ALM	Asset Liability Management	IPO	Initial Public Offering
ASC	Accounting Standards Codification	IRR	Interest Rate Risk
ASU	Accounting Standards Update	LIBOR	London Inter-bank Offered Rate
Basel III	A comprehensive capital framework and rules for U.S. banking organizations approved by the FRB and the FDIC in 2013	LIHTC	Low Income Housing Tax Credit
BHCA	Bank Holding Company Act of 1956, as amended	MBS	Mortgage-Backed Securities
BOLI	Bank Owned Life Insurance	MVE	Market Value of Equity
CARES Act	Coronavirus Aid, Relief, and Economic Security Act	NAV	Net Asset Value
CDI	Core Deposit Intangible Assets	NII	Net Interest Income
CECL	Current Expected Credit Loss	NIM	Net Interest Margin
CET1	Common Equity Tier 1	NSF	Non-Sufficient Funds
Civic	Civic Financial Services, LLC (a company acquired on February 1, 2021)	OREO	Other Real Estate Owned
CMBS	Commercial Mortgage-Backed Securities	PPP	Paycheck Protection Program
CMOs	Collateralized Mortgage Obligations	PRSUs	Performance-Based Restricted Stock Units
Retail Non-Maturity Deposits	Includes noninterest-bearing checking accounts, non-brokered interest checking accounts, non-brokered money market accounts, and savings accounts	PWAM	Pacific Western Asset Management Inc.
COVID-19	Coronavirus Disease	ROU	Right-of-use
CPI	Consumer Price Index	S&P	Standard & Poor's
CRA	Community Reinvestment Act	SBA	Small Business Administration
CRE	Commercial Real Estate	SBIC	Small Business Investment Company
CRI	Customer Relationship Intangible Assets	SEC	Securities and Exchange Commission
DFPI	California Department of Financial Protection and Innovation	SOFR	Secured Overnight Financing Rate
DTAs	Deferred Tax Assets	Tax Equivalent Net Interest Income	Net interest income reflecting adjustments related to tax-exempt interest on certain loans and investment securities
Dodd-Frank Act	Dodd-Frank Wall Street Reform and Consumer Protection Act	Tax Equivalent NIM	NIM reflecting adjustments related to tax-exempt interest on certain loans and investment securities
Efficiency Ratio	Noninterest expense (less intangible asset amortization, net foreclosed assets expense (income), goodwill impairment, and acquisition, integration and reorganization costs) divided by net revenues (the sum of tax equivalent net interest income plus noninterest income, less gain/loss on sale of securities and gain/loss on sales of assets other than loans and leases)	TDRs	Troubled Debt Restructurings
FASB	Financial Accounting Standards Board	TRSAs	Time-Based Restricted Stock Awards
FDIC	Federal Deposit Insurance Corporation	U.S. GAAP	U.S. Generally Accepted Accounting Principles
FHLB	Federal Home Loan Bank of San Francisco	VIE	Variable Interest Entity
FRB	Board of Governors of the Federal Reserve System		

**ITEM 1. CONDENSED CONSOLIDATED FINANCIAL STATEMENTS (UNAUDITED)**

**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED BALANCE SHEETS**

	March 31, 2023	December 31, 2022
(Unaudited)		
(Dollars in thousands, except par value amounts)		
<b>ASSETS:</b>		
Cash and due from banks	\$ 218,830	\$ 212,273
Interest-earning deposits in financial institutions	6,461,306	2,027,949
Total cash, cash equivalents, and restricted cash	6,680,136	2,240,222
Securities available-for-sale, at fair value (amortized cost of \$5,591,766 and \$5,654,617, respectively)	4,848,607	4,843,487
Securities held-to-maturity, at amortized cost, net of allowance for credit losses (fair value of \$2,157,056 and \$2,110,472, respectively)	2,273,650	2,269,135
Federal Home Loan Bank stock, at cost	147,150	34,290
Total investment securities	7,269,407	7,146,912
Loans held for sale	2,796,208	65,076
Gross loans and leases held for investment	25,770,912	28,726,016
Deferred fees, net	(98,531)	(116,887)
Allowance for loan and lease losses	(210,055)	(200,732)
Total loans and leases held for investment, net	25,462,326	28,408,397
Equipment leased to others under operating leases	399,972	404,245
Premises and equipment, net	60,358	54,315
Foreclosed assets, net	2,135	5,022
Goodwill	—	1,376,736
Core deposit and customer relationship intangibles, net	28,970	31,381
Other assets	1,603,469	1,496,630
Total assets	\$ 44,302,981	\$ 41,228,936
<b>LIABILITIES:</b>		
Noninterest-bearing deposits	\$ 7,030,759	\$ 11,212,357
Interest-bearing deposits	21,156,802	22,723,977
Total deposits	28,187,561	33,936,334
Borrowings (including \$128,375 at fair value)	11,881,712	1,764,030
Subordinated debt	868,815	867,087
Accrued interest payable and other liabilities	593,416	710,954
Total liabilities	41,531,504	37,278,405
Commitments and contingencies		
<b>STOCKHOLDERS' EQUITY:</b>		
Preferred stock (\$0.01 par value; 5,000,000 shares authorized; 513,250 Series A shares, \$1,000 per share liquidation preference, issued and outstanding at March 31, 2023 and December 31, 2022)	498,516	498,516
Common stock (\$0.01 par value, 200,000,000 shares authorized at March 31, 2023 and December 31, 2022; 123,169,017 and 123,000,557 shares issued, respectively, includes 2,207,618 and 2,405,878 shares of unvested restricted stock, respectively)	1,232	1,230
Additional paid-in capital	2,903,428	2,927,903
Retained earnings	215,253	1,420,624
Treasury stock, at cost (2,924,803 and 2,778,500 shares at March 31, 2023 and December 31, 2022)	(110,892)	(106,839)
Accumulated other comprehensive (loss) income, net	(736,060)	(790,903)
Total stockholders' equity	2,771,477	3,950,531
Total liabilities and stockholders' equity	\$ 44,302,981	\$ 41,228,936

See Notes to Condensed Consolidated Financial Statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED STATEMENTS OF EARNINGS (LOSS)**

	Three Months Ended	
	March 31,	
	2023	2022
	(Unaudited)	
	(In thousands, except per share amounts)	
<b>Interest income:</b>		
Loans and leases	\$ 430,685	\$ 267,759
Investment securities	44,237	53,422
Deposits in financial institutions	42,866	1,723
Total interest income	517,788	322,904
<b>Interest expense:</b>		
Deposits	155,892	6,208
Borrowings	69,122	161
Subordinated debt	13,502	7,818
Total interest expense	238,516	14,187
Net interest income	279,272	308,717
<b>Provision for credit losses</b>	3,000	—
Net interest income after provision for credit losses	276,272	308,717
<b>Noninterest income:</b>		
Leased equipment income	13,857	13,094
Other commissions and fees	10,344	11,580
Service charges on deposit accounts	3,573	3,571
Gain on sale of loans and leases	2,962	60
Gain on sale of securities	—	104
Dividends and gains (losses) on equity investments	1,098	(11,375)
Warrant (loss) income	(333)	629
Other income	4,890	3,155
Total noninterest income	36,391	20,818
<b>Noninterest expense:</b>		
Compensation	88,476	92,240
Occupancy	15,067	15,200
Customer related expense	24,005	12,655
Other professional services	6,073	5,954
Data processing	10,938	9,629
Leased equipment depreciation	9,375	9,189
Insurance and assessments	11,717	5,490
Loan expense	6,524	5,157
Intangible asset amortization	2,411	3,649
Foreclosed assets expense (income), net	363	(3,353)
Acquisition, integration and reorganization costs	8,514	—
Goodwill impairment	1,376,736	—
Other expense	12,804	11,616
Total noninterest expense	1,573,003	167,426
(Loss) earnings before income taxes	(1,260,340)	162,109
Income tax (benefit) expense	(64,916)	41,981
<b>Net (loss) earnings</b>	(1,195,424)	120,128
Preferred stock dividends	9,947	—
<b>Net (loss) earnings available to common stockholders</b>	\$ (1,205,371)	\$ 120,128
<b>(Loss) earnings per common share:</b>		
Basic	\$ (10.22)	\$ 1.01
Diluted	\$ (10.22)	\$ 1.01

See Notes to Condensed Consolidated Financial Statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME (LOSS)**

	Three Months Ended	
	March 31,	
	2023	2022
	(Unaudited)	
	(In thousands)	
<b>Net (loss) earnings</b>	\$ (1,195,424)	\$ 120,128
<b>Other comprehensive income (loss), net of tax:</b>		
Unrealized net holding gains (losses) on securities available-for-sale arising during the period	67,971	(609,826)
Income tax (expense) benefit related to unrealized net holding losses arising during the period	(18,828)	167,458
Unrealized net holding gains (losses) on securities available-for-sale, net of tax	49,143	(442,368)
Reclassification adjustment for net (gains) losses included in net earnings <sup>(1)</sup>	—	(104)
Income tax expense (benefit) related to reclassification adjustment	—	29
Reclassification adjustment for net (gains) losses included in net earnings, net of tax	—	(75)
Amortization of unrealized net loss on securities transferred from available-for-sale to held-to-maturity	7,884	—
Income tax benefit related to amortization of unrealized net loss on securities transferred from available-for-sale to held-to-maturity	(2,184)	—
Amortization of unrealized net loss on securities transferred from available-for-sale to held-to-maturity, net of tax	5,700	—
Other comprehensive income (loss), net of tax	54,843	(442,443)
<b>Comprehensive loss</b>	<b>\$ (1,140,581)</b>	<b>\$ (322,315)</b>

(1) Entire amounts are recognized in "Gain (loss) on sale of securities" on the Condensed Consolidated Statements of Earnings.

See Notes to Condensed Consolidated Financial Statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED STATEMENTS OF CHANGES IN STOCKHOLDERS' EQUITY**

Three Months Ended March 31, 2023								
Preferred Stock <sup>(1)</sup>	Common Stock			Additional Paid-in Capital	Retained Earnings	Treasury Stock	Accumulated Other Comprehensive (Loss) Income	Total
	Shares	Par Value						
(Unaudited)								
(In thousands, except per share amount)								
<b>Balance, December 31, 2022</b>	\$ 498,516	120,222,057	\$ 1,230	\$ 2,927,903	\$ 1,420,624	\$ (106,839)	\$ (790,903)	\$ 3,950,531
Net loss	—	—	—	—	(1,195,424)	—	—	(1,195,424)
Other comprehensive income, net of tax	—	—	—	—	—	—	54,843	54,843
Restricted stock awarded and earned stock compensation, net of shares forfeited	—	168,460	2	4,981	—	—	—	4,983
Restricted stock surrendered	—	(146,303)	—	—	—	(4,053)	—	(4,053)
Cash dividends paid:								
Preferred stock, \$0.48/share	—	—	—	—	(9,947)	—	—	(9,947)
Common stock, \$0.25/share	—	—	—	(29,456)	—	—	—	(29,456)
<b>Balance, March 31, 2023</b>	<u>\$ 498,516</u>	<u>120,244,214</u>	<u>\$ 1,232</u>	<u>\$ 2,903,428</u>	<u>\$ 215,253</u>	<u>\$ (110,892)</u>	<u>\$ (736,060)</u>	<u>\$ 2,771,477</u>

(1) There were 513,250 shares of Series A preferred stock issued during the 2<sup>nd</sup> quarter of 2022 that remained outstanding at March 31, 2023.

Three Months Ended March 31, 2022								
Preferred Stock	Common Stock			Additional Paid-in Capital	Retained Earnings	Treasury Stock	Accumulated Other Comprehensive (Loss) Income	Total
	Shares	Par Value						
(Unaudited)								
(In thousands, except per share amount)								
<b>Balance, December 31, 2021</b>	\$ —	119,584,854	\$ 1,221	\$ 3,013,399	\$ 1,016,350	\$ (97,308)	\$ 65,968	\$ 3,999,630
Net earnings	—	—	—	—	120,128	—	—	120,128
Other comprehensive loss, net of tax	—	—	—	—	—	—	(442,443)	(442,443)
Restricted stock awarded and earned stock compensation, net of shares forfeited	—	109,466	1	7,556	—	—	—	7,557
Restricted stock surrendered	—	(92,554)	—	—	—	(4,481)	—	(4,481)
Cash dividends paid:								
Common stock, \$0.25/share	—	—	—	(29,796)	—	—	—	(29,796)
<b>Balance, March 31, 2022</b>	<u>\$ —</u>	<u>119,601,766</u>	<u>\$ 1,222</u>	<u>\$ 2,991,159</u>	<u>\$ 1,136,478</u>	<u>\$ (101,789)</u>	<u>\$ (376,475)</u>	<u>\$ 3,650,595</u>

See Notes to Condensed Consolidated Financial Statements.



**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED STATEMENTS OF CASH FLOWS**

	Three Months Ended	
	March 31,	
	2023	2022
	(Unaudited)	
	(In thousands)	
<b>Cash flows from operating activities:</b>		
Net (loss) earnings	\$ (1,195,424)	\$ 120,128
Adjustments to reconcile net (loss) earnings to net cash provided by operating activities:		
Goodwill impairment	1,376,736	—
Depreciation and amortization	13,939	13,577
Amortization of net premiums on investment securities	9,526	15,606
Amortization of intangible assets	2,411	3,649
Amortization of operating lease ROU assets	6,655	7,443
Provision for credit losses	3,000	—
Gain on sale of foreclosed assets	(196)	(3,177)
Provision for losses on foreclosed assets	527	—
Gain on sale of loans and leases	(2,962)	(60)
Gain on sale of premises and equipment	(7)	(2)
Gain on sale of securities	—	(104)
Gain on BOLI death benefit	(350)	—
Unrealized gain on derivatives, foreign currencies, and credit-linked notes, net	(1,781)	(1,176)
Earned stock compensation	4,983	7,557
(Increase) decrease in other assets	(129,223)	29,162
Decrease in accrued interest payable and other liabilities	(108,825)	(58,397)
Net cash (used in) provided by operating activities	<u>(20,991)</u>	<u>134,206</u>
<b>Cash flows from investing activities:</b>		
Net increase in loans and leases	(93,256)	(1,448,692)
Proceeds from sales of loans and leases	290,228	36,758
Proceeds from maturities and paydowns of securities available-for-sale	56,956	243,921
Proceeds from sales of securities available-for-sale	—	206,192
Purchases of securities available-for-sale	(550)	(356,196)
Proceeds from maturities and paydowns of securities held-to-maturity	288	—
Net purchases of Federal Home Loan Bank stock	(112,860)	—
Proceeds from sales of foreclosed assets	5,124	16,020
Purchases of premises and equipment, net	(9,236)	(7,287)
Proceeds from sales of premises and equipment	13	3
Proceeds from BOLI death benefit	1,844	—
Net (increase) decrease in equipment leased to others under operating leases	(5,097)	4,661
Net cash provided by (used in) investing activities	<u>133,454</u>	<u>(1,304,620)</u>
<b>Cash flows from financing activities:</b>		
Net decrease in noninterest-bearing deposits	(4,181,598)	(486,082)
Net decrease in interest-bearing deposits	(1,567,175)	(1,286,780)
Net increase in borrowings	10,119,680	991,000
Restricted stock surrendered	(4,053)	(4,481)
Preferred stock dividends paid	(9,947)	—
Common stock dividends paid	(29,456)	(29,796)
Net cash provided by (used in) financing activities	<u>4,327,451</u>	<u>(816,139)</u>
Net increase (decrease) in cash, cash equivalents, and restricted cash	4,439,914	(1,986,553)
<b>Cash, cash equivalents, and restricted cash, beginning of period</b>	<u>2,240,222</u>	<u>4,057,234</u>
<b>Cash, cash equivalents, and restricted cash, end of period</b>	<u>\$ 6,680,136</u>	<u>\$ 2,070,681</u>

See Notes to Condensed Consolidated Financial Statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**CONDENSED CONSOLIDATED STATEMENTS OF CASH FLOWS**

	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<b>(Unaudited)</b>	
	<b>(In thousands)</b>	
<b>Supplemental disclosures of cash flow information:</b>		
Cash paid for interest	\$ 209,340	\$ 10,635
Cash paid for income taxes	786	2,138
Loans transferred to foreclosed assets	2,568	304
Transfers from loans held for investment to loans held for sale	2,796,365	—

See Notes to Condensed Consolidated Financial Statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 1. ORGANIZATION**

PacWest Bancorp, a Delaware corporation, is a bank holding company registered under the BHCA and headquartered in Los Angeles, California, with an executive office in Denver, Colorado. Our principal business is to serve as the holding company for our wholly-owned subsidiary, Pacific Western Bank. References to "Pacific Western" or the "Bank" refer to Pacific Western Bank together with its wholly-owned subsidiaries. References to "we," "us," or the "Company" refer to PacWest Bancorp together with its subsidiaries on a consolidated basis. When we refer to "PacWest" or to the "holding company," we are referring to PacWest Bancorp, the parent company, on a stand-alone basis.

The Bank is a relationship-based community bank focused on providing business banking and treasury management services to small, middle-market, and venture-backed businesses. The Bank offers a broad range of loan and lease and deposit products and services through full-service branches throughout California and in Durham, North Carolina and Denver, Colorado, and loan production offices around the country.

We generate our revenue primarily from interest received on loans and leases and, to a lesser extent, from interest received on investment securities, and fees received in connection with deposit services, extending credit and other services offered, including treasury management and investment management services. Our major operating expenses are interest paid by the Bank on deposits and borrowings, compensation, occupancy, and general operating expenses.

***Significant Accounting Policies***

Our accounting policies are described in Note 1. *Nature of Operations and Summary of Significant Accounting Policies*, of our audited consolidated financial statements included in our Annual Report on Form 10-K for the year ended December 31, 2022 as filed with the Securities and Exchange Commission ("Form 10-K"). Updates to our significant accounting policies described below reflect the impact of the adoption of ASU 2022-02, "Financial Instruments - Credit Losses (Topic 326): Troubled Debt Restructurings and Vintage Disclosures ("ASU 2022-02")," specifically the amendment to troubled debt restructurings, and organizational changes which resulted in changes to our reportable operating segments.

***Loan Modifications to Borrowers Experiencing Financial Difficulty***

Loan modifications made to borrowers experiencing financial difficulty constitute modifications of receivables in the form of principal forgiveness, an interest rate reduction, an other than-insignificant payment delay, or a term extension. ASU 2022-02 eliminated the concept of troubled debt restructurings, and introduced broader modification reporting requirements. Previously, troubled debt restructurings included any type of modification that included a below market concession which was granted both to a borrower in financial difficulty and as a result of financial difficulty. Loan modifications made to borrowers experiencing financial difficulty no longer consider whether a market concession has been granted, as was required with troubled debt restructurings, but rather includes as modifications within the four listed reportable modification types to a borrower deemed to be experiencing financial difficulty. An assessment of whether a borrower is experiencing financial difficulty is made on the date of the modification. Loans reported in this classification have a rating of substandard or worse, and may include both accruing and nonaccruing loans. Loans are assessed to determine whether the modification constitutes a new loan or a continuation of the existing loan. Depending on the terms of the modification and nature of the borrower, this may result in a downgrade or placing a loan on nonaccrual status, which in turn would impact the loan's classification within the ALLL. Because the effect of most modifications made to borrowers experiencing financial difficulty is already included in the allowance for credit losses because of the measurement methodologies used to estimate the allowance, a change to the allowance for credit losses is generally not recorded upon modification.

***Business Segments***

We regularly assess our strategic plans, operations, reporting structures and financial information provided to management to identify our reportable segments. Civic, a lending subsidiary we acquired in February 2021, has historically been identified as an operating segment. In the fourth quarter of 2022, Civic met a quantitative threshold which required it to be disclosed as a reportable operating segment. Therefore, we had two reportable operating segments as of December 31, 2022: Commercial Banking and Civic, and a third segment, Other, which was used for inter-segment eliminations. In the first quarter of 2023, we began a restructuring of Civic which included removing most of Civic's top management and transferring day-to-day management of most of Civic's operating functions to managers at the Bank. Due to the restructuring of Civic, discrete financial information is no longer prepared. Our management reporting captures the direct expenses of Civic, however, none of the expenses now being incurred to manage Civic are being directly charged or allocated to Civic. Therefore, it is no longer feasible to produce meaningful, separate full financial statements, and thus, discrete financial information for Civic is no longer prepared or distributed to our chief operating decision maker. Thus, Civic no longer meets the criteria to be considered a

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

reportable operating segment. At March 31, 2023, we operated as one reportable segment - Commercial Banking.

***Accounting Standards Adopted in 2023***

Effective January 1, 2023, we completed the adoption of ASU 2022-02, "*Financial Instruments – Credit Losses (Topic 326): Troubled Debt Restructurings and Vintage Disclosures*," by eliminating the accounting guidance for TDRs by creditors, in ASC 310-40, *Receivables – Troubled Debt Restructurings by Creditors*, while enhancing disclosure requirements for restructurings involving borrowers that are experiencing financial difficulty. The Company updated its disclosures in Note 4, *Loans and Leases* to present information regarding loan modifications to borrowers experiencing financial difficulty. There was no transition adjustment recorded to retained earnings upon adoption. The adoption of this amendment did not have a material impact on the Company's condensed consolidated financial statements.

***Basis of Presentation***

Our interim condensed consolidated financial statements are prepared in accordance with U.S. GAAP for interim financial information and pursuant to the requirements for reporting on Form 10-Q and Article 10 of Regulation S-X of the Securities Exchange Act of 1934. Accordingly, certain disclosures accompanying annual consolidated financial statements are omitted. In the opinion of management, all significant intercompany accounts and transactions have been eliminated and adjustments, consisting solely of normal recurring accruals and considered necessary for the fair presentation of financial statements for the interim periods, have been included. The current period's results of operations are not necessarily indicative of the results that ultimately may be achieved for the year. The interim condensed consolidated financial statements and notes thereto should be read in conjunction with the audited consolidated financial statements and notes thereto included in our Form 10-K.

***Use of Estimates***

We have made a number of estimates and assumptions related to the reporting of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the condensed consolidated financial statements and the reported amounts of revenue and expenses during the reporting period to prepare these condensed consolidated financial statements in conformity with U.S. GAAP. Actual results could differ from those estimates. Material estimates subject to change in the near term include, among other items, the allowance for credit losses (the combination of the allowance for loan and lease losses and the reserve for unfunded loan commitments), the carrying value of goodwill and other intangible assets, the fair value of loans held for sale, and the realization of deferred tax assets. These estimates may be adjusted as more current information becomes available, and any adjustment may be significant.

***Reclassifications***

Certain prior period amounts have been reclassified to conform to the current period's presentation format. In our loan and allowance tables, we realigned certain of our loan portfolio classes and subclasses to better reflect and report our lending. We made the following changes: (1) moved the "Multi-family" loan subclass from the residential real estate mortgage class into its own loan class; (2) moved the "Construction - renovation" loan subclass from the residential real estate construction and land loan class to the residential real estate mortgage class and renamed it "Residential renovation;" and (3) renamed the residential real estate mortgage loan class as "Other residential." All of the loan and allowance tables, both current period and prior periods, reflect these changes and realignment.

***Risks and Uncertainties***

The recent bank failures involving three prominent regional banks have resulted in significant market volatility among publicly traded bank holding companies, and, in particular, regional banks like PacWest. These bank failures, and the resulting customer fear of additional bank failures, has increased the following risks and uncertainties regarding our business; (i) the loss of customer deposits which, in turn, has put pressure on our liquidity position, (ii) the decrease in our net interest margin resulting from replacing lower-cost customer deposits with higher-cost brokered deposits and borrowings, (iii) the downgrading of our credit rating by third-party rating agencies which may result in increased borrowing costs and/or trigger additional collateral or funding requirements, and (iv) the potential for operating costs to increase due to higher FDIC assessments and other costs necessary to respond to increased regulatory requirements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

To respond to these increased risks and uncertainties we have taken the following actions to mitigate these risks; (a) we pledged additional assets as collateral for borrowings to increase our liquidity position for potential deposit outflows, (b) we have increased the number of customers enrolled in reciprocal deposit programs that increases the amount of FDIC insurance coverage on their account(s) to help retain these customers; (c) we are offering competitive promotional rates on our deposit products to attract new customer deposits, (d) we intend to complete strategic asset sales in the second quarter of 2023 to improve our liquidity position and capital ratios, and (e) we reduced our second quarter 2023 common dividend from \$0.25 to \$0.01 to improve our liquidity position and capital ratios.

**NOTE 2. RESTRICTED CASH**

The FRBSF establishes cash reserve requirements that its member banks must maintain based on a percentage of deposit liabilities. There were no reserves required to be held at the FRBSF for the three months ended March 31, 2023. As of March 31, 2023 and December 31, 2022, we pledged cash collateral for our derivative contracts of \$2.4 million and \$2.7 million. We have cash which is restricted based on the terms of some of our borrowing agreements that totaled \$151.1 million at March 31, 2023 and \$131.5 million at December 31, 2022.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 3. INVESTMENT SECURITIES**

***Transfer of Securities Available-for-Sale to Held-to Maturity***

Effective June 1, 2022, the Company transferred \$2.3 billion in fair value of municipal securities, agency commercial MBS, private label commercial MBS, U.S. Treasury securities, and corporate debt securities from available-for-sale to held-to-maturity. At the time of transfer, \$218.3 million of unrealized losses, net of tax, was retained in "Accumulated other comprehensive income (loss)" on the condensed consolidated balance sheets.

***Securities Available-for-Sale***

The following table presents amortized cost, gross unrealized gains and losses, and fair values of securities available-for-sale as of the dates indicated:

Security Type	March 31, 2023				December 31, 2022			
	Amortized Cost	Gross Unrealized Gains	Gross Unrealized Losses	Fair Value	Amortized Cost	Gross Unrealized Gains	Gross Unrealized Losses	Fair Value
<i>(In thousands)</i>								
Agency residential MBS	\$ 2,645,975	\$ —	\$ (396,895)	\$ 2,249,080	\$ 2,685,038	\$ —	\$ (442,996)	\$ 2,242,042
U.S. Treasury securities	771,208	—	(85,772)	685,436	771,145	—	(101,075)	670,070
Agency commercial MBS	545,480	—	(53,799)	491,681	549,492	—	(61,886)	487,606
Agency residential CMOs	509,303	—	(53,621)	455,682	517,174	—	(60,111)	457,063
Municipal securities	395,709	—	(50,070)	345,639	399,724	—	(60,398)	339,326
Corporate debt securities	344,747	—	(54,953)	289,794	344,767	6	(32,868)	311,905
Private label residential CMOs	203,088	—	(38,685)	164,403	207,123	—	(40,399)	166,724
Collateralized loan obligations	109,166	—	(6,172)	102,994	109,159	—	(6,898)	102,261
Private label commercial MBS	27,331	—	(1,796)	25,535	28,903	—	(2,076)	26,827
Asset-backed securities	22,864	—	(407)	22,457	23,568	—	(1,155)	22,413
SBA securities	16,895	—	(989)	15,906	18,524	—	(1,274)	17,250
Total	\$ 5,591,766	\$ —	\$ (743,159)	\$ 4,848,607	\$ 5,654,617	\$ 6	\$ (811,136)	\$ 4,843,487

As of March 31, 2023, the Company had not recorded an allowance for credit losses on securities available-for-sale. The Company does not consider unrealized losses on such securities to be attributable to credit-related factors, as the unrealized losses have occurred as a result of changes in non-credit related factors such as interest rates, market spreads, and market conditions subsequent to purchase.

As of March 31, 2023, securities available-for-sale with a fair value of \$4.6 billion were pledged as collateral primarily for the Bank Term Funding Program borrowings, FRB secured line of credit, and FHLB secured line of credit borrowings.

***Realized Gains and Losses on Securities Available-for-Sale***

The following table presents the amortized cost of securities sold with related gross realized gains, gross realized losses, and net realized (losses) gains for the years indicated:

Sales of Securities Available-for-Sale	Three Months Ended	
	2023	2022
<i>(In thousands)</i>		
Amortized cost of securities sold	\$ —	\$ 206,088
Gross realized gains	\$ —	\$ 1,190
Gross realized losses	—	(1,086)
Net realized gains (losses)	\$ —	\$ 104

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

***Unrealized Losses on Securities Available-for-Sale***

The following tables present the gross unrealized losses and fair values of securities available-for-sale that were in unrealized loss positions as of the dates indicated:

Security Type	March 31, 2023					
	Less Than 12 Months		12 Months or More		Total	
	Fair Value	Gross Unrealized Losses	Fair Value	Gross Unrealized Losses	Fair Value	Gross Unrealized Losses
	<i>(In thousands)</i>					
Agency residential MBS	\$ 6,665	\$ (306)	\$ 2,242,415	\$ (396,589)	\$ 2,249,080	\$ (396,895)
U.S. Treasury securities	4,993	(7)	680,443	(85,765)	685,436	(85,772)
Agency commercial MBS	20,806	(977)	470,875	(52,822)	491,681	(53,799)
Agency residential CMOs	35,116	(2,707)	420,566	(50,914)	455,682	(53,621)
Municipal securities	836	(44)	344,803	(50,026)	345,639	(50,070)
Corporate debt securities	119,754	(18,667)	170,040	(36,286)	289,794	(54,953)
Private label residential CMOs	1,226	(6)	163,177	(38,679)	164,403	(38,685)
Collateralized loan obligations	18,690	(838)	84,304	(5,334)	102,994	(6,172)
Private label commercial MBS	—	—	25,534	(1,796)	25,534	(1,796)
Asset-backed securities	—	—	22,457	(407)	22,457	(407)
SBA securities	—	—	15,906	(989)	15,906	(989)
Total	<u>\$ 208,086</u>	<u>\$ (23,552)</u>	<u>\$ 4,640,520</u>	<u>\$ (719,607)</u>	<u>\$ 4,848,606</u>	<u>\$ (743,159)</u>

Security Type	December 31, 2022					
	Less Than 12 Months		12 Months or More		Total	
	Fair Value	Gross Unrealized Losses	Fair Value	Gross Unrealized Losses	Fair Value	Gross Unrealized Losses
	<i>(In thousands)</i>					
Agency residential MBS	\$ 52,556	\$ (6,193)	\$ 2,189,485	\$ (436,803)	\$ 2,242,041	\$ (442,996)
U.S. Treasury securities	4,972	(26)	665,098	(101,049)	670,070	(101,075)
Agency commercial MBS	316,892	(31,139)	170,714	(30,747)	487,606	(61,886)
Agency residential CMOs	245,755	(22,748)	211,309	(37,363)	457,064	(60,111)
Municipal securities	37,380	(3,129)	298,266	(57,269)	335,646	(60,398)
Corporate debt securities	302,643	(32,124)	4,256	(744)	306,899	(32,868)
Private label residential CMOs	19,261	(1,294)	147,464	(39,105)	166,725	(40,399)
Collateralized loan obligations	27,704	(1,818)	74,558	(5,080)	102,262	(6,898)
Private label commercial MBS	10,204	(508)	16,623	(1,568)	26,827	(2,076)
Asset-backed securities	22,413	(1,155)	—	—	22,413	(1,155)
SBA securities	17,250	(1,274)	—	—	17,250	(1,274)
Total	<u>\$ 1,057,030</u>	<u>\$ (101,408)</u>	<u>\$ 3,777,773</u>	<u>\$ (709,728)</u>	<u>\$ 4,834,803</u>	<u>\$ (811,136)</u>

The securities that were in an unrealized loss position at March 31, 2023, were considered impaired and required further review to determine if the unrealized losses were credit-related. We concluded the unrealized losses were a result of the level of market interest rates relative to the types of securities and pricing changes caused by shifting supply and demand dynamics and not a result of downgraded credit ratings or other indicators of deterioration of the underlying issuers' ability to repay. We also considered the seniority of the tranches and U.S. government agency guarantees, if any, to assess whether an unrealized loss was credit-related. Accordingly, we determined the unrealized losses were not credit-related and recognized the unrealized losses in "Accumulated other comprehensive (loss) income" of "Stockholders' equity" on the condensed consolidated balance sheets. Although we periodically sell securities for portfolio management purposes, we do not foresee having to sell any impaired securities and believe that it is more likely than not we would not be required to sell any impaired securities before recovery of their amortized cost.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**Contractual Maturities of Securities Available-for-Sale**

The following table presents the contractual maturities of our securities available-for-sale portfolio based on amortized cost and carrying value as of the date indicated:

Security Type	March 31, 2023					Total
	Due Within One Year	Due After One Year Through Five Years	Due After Five Years Through Ten Years	Due After Ten Years		
<i>(In thousands)</i>						
<b>Amortized Cost:</b>						
Agency residential MBS	\$ —	\$ —	\$ —	\$ 2,645,975	\$ —	2,645,975
U.S. Treasury securities	4,999	503,869	262,340	—	—	771,208
Agency commercial MBS	—	205,442	321,502	18,536	—	545,480
Agency residential CMOs	—	—	175,473	333,830	—	509,303
Municipal securities	—	53,855	319,463	22,391	—	395,709
Corporate debt securities	—	5,000	339,747	—	—	344,747
Private label residential CMOs	—	—	—	203,088	—	203,088
Collateralized loan obligations	—	—	70,329	38,837	—	109,166
Private label commercial MBS	—	—	—	27,331	—	27,331
Asset-backed securities	—	—	—	22,864	—	22,864
SBA securities	—	3,409	—	13,486	—	16,895
<b>Total</b>	<b>\$ 4,999</b>	<b>\$ 771,575</b>	<b>\$ 1,488,854</b>	<b>\$ 3,326,338</b>	<b>\$ —</b>	<b>\$ 5,591,766</b>
<b>Fair Value:</b>						
Agency residential MBS	\$ —	\$ —	\$ —	\$ 2,249,080	\$ —	2,249,080
U.S. Treasury securities	4,993	448,478	231,965	—	—	685,436
Agency commercial MBS	—	191,319	282,520	17,842	—	491,681
Agency residential CMOs	—	—	154,603	301,079	—	455,682
Municipal securities	—	48,293	276,487	20,859	—	345,639
Corporate debt securities	—	4,957	284,837	—	—	289,794
Private label residential CMOs	—	—	—	164,403	—	164,403
Collateralized loan obligations	—	—	67,321	35,673	—	102,994
Private label commercial MBS	—	—	—	25,535	—	25,535
Asset-backed securities	—	—	—	22,457	—	22,457
SBA securities	—	3,279	—	12,627	—	15,906
<b>Total</b>	<b>\$ 4,993</b>	<b>\$ 696,326</b>	<b>\$ 1,297,733</b>	<b>\$ 2,849,555</b>	<b>\$ —</b>	<b>\$ 4,848,607</b>

CMBS, CMOs, and MBS have contractual maturity dates, but require periodic payments based upon scheduled amortization terms. Actual principal collections on these securities usually occur more rapidly than the scheduled amortization terms because of prepayments made by obligors of the underlying loan collateral.



**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**Securities Held-to-Maturity**

The following table presents amortized cost, allowance for credit losses, gross unrealized gains and losses, and fair values of securities held-to-maturity as of the date indicated:

March 31, 2023						
Security Type	Amortized Cost	Allowance for Credit Losses	Net Carrying Amount	Gross Unrealized Gains	Gross Unrealized Losses	Fair Value
<i>(In thousands)</i>						
Municipal securities	\$ 1,244,441	\$ (140)	\$ 1,244,301	\$ 814	\$ (41,203)	\$ 1,203,912
Agency commercial MBS	428,995	—	428,995	—	(26,135)	402,860
Private label commercial MBS	346,976	—	346,976	—	(28,371)	318,605
U.S. Treasury securities	184,862	—	184,862	—	(8,233)	176,629
Corporate debt securities	69,876	(1,360)	68,516	—	(13,466)	55,050
Total <sup>(1)</sup>	<u>\$ 2,275,150</u>	<u>\$ (1,500)</u>	<u>\$ 2,273,650</u>	<u>\$ 814</u>	<u>\$ (117,408)</u>	<u>\$ 2,157,056</u>

(1) Excludes accrued interest receivable of \$11.3 million at March 31, 2023 which is recorded in "Other assets" on the condensed consolidated balance sheets.

December 31, 2022						
Security Type	Amortized Cost	Allowance for Credit Losses	Net Carrying Amount	Gross Unrealized Gains	Gross Unrealized Losses	Fair Value
<i>(In thousands)</i>						
Municipal securities	\$ 1,243,443	\$ (140)	\$ 1,243,303	\$ 8	\$ (77,526)	\$ 1,165,785
Agency commercial MBS	427,411	—	427,411	—	(34,287)	393,124
Private label commercial MBS	345,825	—	345,825	—	(26,027)	319,798
U.S. Treasury securities	184,162	—	184,162	—	(12,462)	171,700
Corporate debt securities	69,794	(1,360)	68,434	—	(8,369)	60,065
Total <sup>(1)</sup>	<u>\$ 2,270,635</u>	<u>\$ (1,500)</u>	<u>\$ 2,269,135</u>	<u>\$ 8</u>	<u>\$ (158,671)</u>	<u>\$ 2,110,472</u>

(1) Excludes accrued interest receivable of \$13.5 million at December 31, 2022 which is recorded in "Other assets" on the condensed consolidated balance sheets.

As of March 31, 2023, securities held-to-maturity with a fair value of \$2.1 billion were pledged as collateral primarily for public deposits, the FRB secured line of credit, Bank Term Funding Program borrowings, and letters of credit.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

***Allowance for Credit Losses on Securities Held-to-Maturity***

The following table presents the changes by major security type in our allowance for credit losses on securities held-to-maturity for the periods indicated:

<u>Security Type</u>	<u>Allowance for Credit Losses, Beginning of Period</u>	<u>Provision for Credit Losses</u>	<u>Charge-offs</u>	<u>Recoveries</u>	<u>Allowance for Credit Losses, End of Period</u>
<i>(In thousands)</i>					
<b>Three Months Ended March 31, 2023</b>					
Municipal securities	\$ 140	\$ —	\$ —	\$ —	\$ 140
Corporate debt securities	1,360	—	—	—	1,360
Total	<u>\$ 1,500</u>	<u>\$ —</u>	<u>\$ —</u>	<u>\$ —</u>	<u>\$ 1,500</u>

Credit losses on HTM securities are recorded at the time of purchase, acquisition, or when the Company designates securities as held-to-maturity. Credit losses on HTM securities are representative of current expected credit losses that may be incurred over the life of the investment. Accrued interest receivable on HTM securities, which is included in other assets on the condensed consolidated balance sheets, is excluded from the estimate of expected credit losses. HTM U.S. treasury securities and agency-backed MBS securities are considered to have no risk of loss as they are either explicitly or implicitly guaranteed by the U.S. government. The change in fair value in the HTM private label CMBS portfolio is solely driven by changes in interest rates. The Company has no knowledge of any underlying credit issues and the cash flows underlying the debt securities have not changed and are not expected to be impacted by changes in interest rates and, thus, there is no related ACL for this portfolio. The underlying bonds in the Company's HTM municipal securities and HTM corporate debt securities portfolios are evaluated for credit losses in conjunction with management's estimate of the allowance for credit losses based primarily on credit ratings.

***Securities Held-to-Maturity by Credit Quality Indicator***

The Company uses S&P, Moody's, Fitch, Kroll, and Egan Jones ratings as the credit quality indicators for its held-to-maturity securities. The following table presents our securities held-to-maturity portfolio at amortized cost by the lowest available credit rating as of the dates indicated:

<u>Security Type</u>	<u>March 31, 2023</u>								<u>Total</u>
	<u>AAA</u>	<u>AA+</u>	<u>AA</u>	<u>AA-</u>	<u>A</u>	<u>A-</u>	<u>BBB</u>	<u>NR</u>	
<i>(In thousands)</i>									
<b>Amortized Cost:</b>									
Municipal securities	\$ 551,978	\$ 397,018	\$ 174,273	\$ 95,566	\$ 1,898	\$ —	\$ —	\$ 23,708	\$ 1,244,441
Agency commercial MBS	—	428,995	—	—	—	—	—	—	428,995
Private label commercial MBS	346,976	—	—	—	—	—	—	—	346,976
U.S. Treasury securities	—	184,862	—	—	—	—	—	—	184,862
Corporate debt securities	—	—	—	—	23,268	21,007	25,601	69,876	69,876
Total	<u>\$ 898,954</u>	<u>\$ 1,010,875</u>	<u>\$ 174,273</u>	<u>\$ 95,566</u>	<u>\$ 1,898</u>	<u>\$ 23,268</u>	<u>\$ 21,007</u>	<u>\$ 49,309</u>	<u>\$ 2,275,150</u>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Security Type	December 31, 2022									Total
	AAA	AA+	AA	AA-	A	A-	BBB	NR		
	<i>(In thousands)</i>									
<b>Amortized Cost:</b>										
Municipal securities	\$ 568,674	\$ 385,990	\$ 173,751	\$ 95,471	\$ 1,901	\$ —	\$ —	\$ 17,656	\$ —	\$ 1,243,443
Agency commercial MBS	—	427,411	—	—	—	—	—	—	—	427,411
Private label commercial MBS	345,825	—	—	—	—	—	—	—	—	345,825
U.S. Treasury securities	—	184,162	—	—	—	—	—	—	—	184,162
Corporate debt securities	—	—	—	—	—	23,244	20,999	25,551	—	69,794
<b>Total</b>	<b>\$ 914,499</b>	<b>\$ 997,563</b>	<b>\$ 173,751</b>	<b>\$ 95,471</b>	<b>\$ 1,901</b>	<b>\$ 23,244</b>	<b>\$ 20,999</b>	<b>\$ 43,207</b>	<b>\$ —</b>	<b>\$ 2,270,635</b>

**Contractual Maturities of Securities Held-to-Maturity**

The following table presents the contractual maturities of our securities held-to-maturity portfolio based on amortized cost and fair value as of the date indicated:

Security Type	March 31, 2023					Total
	Due Within One Year	Due After One Year Through Five Years	Due After Five Years Through Ten Years	Due After Ten Years		
	<i>(In thousands)</i>					
<b>Amortized Cost:</b>						
Municipal securities	\$ —	\$ —	\$ 350,751	\$ 893,690	\$ —	\$ 1,244,441
Agency commercial MBS	—	—	407,855	21,140	—	428,995
Private label commercial MBS	—	—	36,089	310,887	—	346,976
U.S. Treasury securities	—	—	184,862	—	—	184,862
Corporate debt securities	—	—	—	69,876	—	69,876
<b>Total</b>	<b>\$ —</b>	<b>\$ —</b>	<b>\$ 979,557</b>	<b>\$ 1,295,593</b>	<b>\$ —</b>	<b>\$ 2,275,150</b>
<b>Fair Value:</b>						
Municipal securities	\$ —	\$ —	\$ 335,601	\$ 868,311	\$ —	\$ 1,203,912
Agency commercial MBS	—	—	382,601	20,259	—	402,860
Private label commercial MBS	—	—	33,282	285,323	—	318,605
U.S. Treasury securities	—	—	176,629	—	—	176,629
Corporate debt securities	—	—	—	55,050	—	55,050
<b>Total</b>	<b>\$ —</b>	<b>\$ —</b>	<b>\$ 928,113</b>	<b>\$ 1,228,943</b>	<b>\$ —</b>	<b>\$ 2,157,056</b>

CMBS have contractual maturity dates, but require periodic payments based upon scheduled amortization terms. Actual principal collections on these securities usually occur more rapidly than the scheduled amortization terms because of prepayments made by obligors of the underlying loan collateral.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

***Interest Income on Investment Securities***

The following table presents the composition of our interest income on investment securities, including available-for-sale and held-to-maturity, for the periods indicated:

	<b>Three Months Ended</b>	
	<b>2023</b>	<b>2022</b>
	<b>March 31,</b>	
	<i>(In thousands)</i>	
Taxable interest	\$ 38,692	\$ 44,642
Non-taxable interest	4,903	8,519
Dividend income	642	261
Total interest income on investment securities	\$ 44,237	\$ 53,422

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 4. LOANS AND LEASES**

Our loans are carried at the principal amount outstanding, net of deferred fees and costs, and in the case of acquired and purchased loans, net of purchase discounts and premiums. Deferred fees and costs and purchase discounts and premiums on acquired loans are recognized as an adjustment to interest income over the contractual life of the loans primarily using the effective interest method or taken into income when the related loans are paid off or included in the carrying amount of loans that are sold.

***Loans and Leases Held for Investment***

The following table summarizes the composition of our loans and leases held for investment as of the dates indicated:

	March 31, 2023	December 31, 2022
	<i>(In thousands)</i>	
Real estate mortgage	\$ 15,436,731	\$ 15,762,351
Real estate construction and land <sup>(1)</sup>	4,674,473	4,221,853
Commercial	5,232,521	8,297,182
Consumer	427,187	444,630
Total gross loans and leases held for investment	25,770,912	28,726,016
Deferred fees, net	(98,531)	(116,887)
Total loans and leases held for investment, net of deferred fees	25,672,381	28,609,129
Allowance for loan and lease losses	(210,055)	(200,732)
Total loans and leases held for investment, net <sup>(2)</sup>	\$ 25,462,326	\$ 28,408,397

(1) Includes land and acquisition and development loans of \$142.9 million and \$153.5 million at March 31, 2023 and December 31, 2022.

(2) Excludes accrued interest receivable of \$131.7 million and \$124.3 million at March 31, 2023 and December 31, 2022, respectively, which is recorded in "Other assets" on the condensed consolidated balance sheets.

The following tables present an aging analysis of our loans and leases held for investment, net of deferred fees, by loan portfolio segment and class as of the dates indicated:

	March 31, 2023				
	30 - 89 Days Past Due	90 or More Days Past Due	Total Past Due	Current	Total
	<i>(In thousands)</i>				
Real estate mortgage:					
Commercial	\$ 3,524	\$ 21,578	\$ 25,102	\$ 3,783,649	\$ 3,808,751
Multi-family	—	—	—	5,523,320	5,523,320
Other residential	138,372	27,080	165,452	5,910,088	6,075,540
Total real estate mortgage	141,896	48,658	190,554	15,217,057	15,407,611
Real estate construction and land:					
Commercial	—	—	—	910,327	910,327
Residential	—	—	—	3,698,113	3,698,113
Total real estate construction and land	—	—	—	4,608,440	4,608,440
Commercial:					
Asset-based	—	420	420	2,067,907	2,068,327
Venture capital	—	—	—	2,058,237	2,058,237
Other commercial	941	352	1,293	1,101,250	1,102,543
Total commercial	941	772	1,713	5,227,394	5,229,107
Consumer	1,594	506	2,100	425,123	427,223
Total	\$ 144,431	\$ 49,936	\$ 194,367	\$ 25,478,014	\$ 25,672,381

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

	December 31, 2022				
	30 - 89 Days Past Due	90 or More Days Past Due	Total Past Due	Current	Total
<i>(In thousands)</i>					
Real estate mortgage:					
Commercial	\$ 1,721	\$ 29,269	\$ 30,990	\$ 3,815,841	\$ 3,846,831
Multi-family	—	—	—	5,607,865	5,607,865
Other residential	101,728	39,875	141,603	6,134,025	6,275,628
Total real estate mortgage	103,449	69,144	172,593	15,557,731	15,730,324
Real estate construction and land:					
Commercial	—	—	—	898,592	898,592
Residential	—	—	—	3,253,580	3,253,580
Total real estate construction and land	—	—	—	4,152,172	4,152,172
Commercial:					
Asset-based	—	434	434	5,139,775	5,140,209
Venture capital	—	—	—	2,033,302	2,033,302
Other commercial	461	1,195	1,656	1,106,795	1,108,451
Total commercial	461	1,629	2,090	8,279,872	8,281,962
Consumer	1,935	149	2,084	442,587	444,671
Total	\$ 105,845	\$ 70,922	\$ 176,767	\$ 28,432,362	\$ 28,609,129

It is our policy to discontinue accruing interest when principal or interest payments are past due 90 days or more (unless the loan is both well secured and in the process of collection) or when, in the opinion of management, there is a reasonable doubt as to the collectability of a loan or lease in the normal course of business. Interest income on nonaccrual loans is recognized only to the extent cash is received and the principal balance of the loan is deemed collectable.

The following table presents our nonaccrual and performing loans and leases held for investment, net of deferred fees, by loan portfolio segment and class as of the dates indicated:

	March 31, 2023			December 31, 2022		
	Nonaccrual	Performing	Total	Nonaccrual	Performing	Total
<i>(In thousands)</i>						
Real estate mortgage:						
Commercial	\$ 32,996	\$ 3,775,755	\$ 3,808,751	\$ 42,509	\$ 3,804,322	\$ 3,846,831
Multi-family	—	5,523,320	5,523,320	—	5,607,865	5,607,865
Other residential	50,060	6,025,480	6,075,540	55,893	6,219,735	6,275,628
Total real estate mortgage	83,056	15,324,555	15,407,611	98,402	15,631,922	15,730,324
Real estate construction and land:						
Commercial	—	910,327	910,327	—	898,592	898,592
Residential	—	3,698,113	3,698,113	—	3,253,580	3,253,580
Total real estate construction and land	—	4,608,440	4,608,440	—	4,152,172	4,152,172
Commercial:						
Asset-based	420	2,067,907	2,068,327	865	5,139,344	5,140,209
Venture capital	—	2,058,237	2,058,237	—	2,033,302	2,033,302
Other commercial	3,123	1,099,420	1,102,543	4,345	1,104,106	1,108,451
Total commercial	3,543	5,225,564	5,229,107	5,210	8,276,752	8,281,962
Consumer	525	426,698	427,223	166	444,505	444,671
Total	\$ 87,124	\$ 25,585,257	\$ 25,672,381	\$ 103,778	\$ 28,505,351	\$ 28,609,129

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

At March 31, 2023, nonaccrual loans and leases included \$49.9 million of loans and leases 90 or more days past due, \$15.1 million of loans and leases 30 to 89 days past due, and \$22.1 million of loans and leases current with respect to contractual payments that were placed on nonaccrual status based on management's judgment regarding their collectability. At December 31, 2022, nonaccrual loans and leases included \$70.9 million of loans and leases 90 or more days past due, \$6.8 million of loans and leases 30 to 89 days past due, and \$26.0 million of current loans and leases that were placed on nonaccrual status based on management's judgment regarding their collectability.

As of March 31, 2023, our three largest loan relationships on nonaccrual status had an aggregate carrying value of \$23.8 million and represented 27% of total nonaccrual loans and leases.

The following tables present the credit risk rating categories for loans and leases held for investment, net of deferred fees, by loan portfolio segment and class as of the dates indicated. Classified loans and leases are those with a credit risk rating of either substandard or doubtful.

	March 31, 2023			
	Classified	Special Mention	Pass	Total
<i>(In thousands)</i>				
<b>Real estate mortgage:</b>				
Commercial	\$ 35,596	\$ 109,020	\$ 3,664,135	\$ 3,808,751
Multi-family	3,586	116,092	5,403,642	5,523,320
Other residential	76,382	44,810	5,954,348	6,075,540
Total real estate mortgage	115,564	269,922	15,022,125	15,407,611
<b>Real estate construction and land:</b>				
Commercial	—	93,641	816,686	910,327
Residential	—	44,997	3,653,116	3,698,113
Total real estate construction and land	—	138,638	4,469,802	4,608,440
<b>Commercial:</b>				
Asset-based	420	33,133	2,034,774	2,068,327
Venture capital	2,615	126,422	1,929,200	2,058,237
Other commercial	13,126	5,036	1,084,381	1,102,543
Total commercial	16,161	164,591	5,048,355	5,229,107
Consumer	698	7,002	419,523	427,223
Total	\$ 132,423	\$ 580,153	\$ 24,959,805	\$ 25,672,381

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

	December 31, 2022			
	Classified	Special Mention	Pass	Total
	<i>(In thousands)</i>			
Real estate mortgage:				
Commercial	\$ 43,737	\$ 106,493	\$ 3,696,601	\$ 3,846,831
Multi-family	3,611	60,330	5,543,924	5,607,865
Other residential	60,557	58,063	6,157,008	6,275,628
Total real estate mortgage	<u>107,905</u>	<u>224,886</u>	<u>15,397,533</u>	<u>15,730,324</u>
Real estate construction and land:				
Commercial	—	91,334	807,258	898,592
Residential	—	45,155	3,208,425	3,253,580
Total real estate construction and land	<u>—</u>	<u>136,489</u>	<u>4,015,683</u>	<u>4,152,172</u>
Commercial:				
Asset-based	865	56,836	5,082,508	5,140,209
Venture capital	2,753	127,907	1,902,642	2,033,302
Other commercial	6,473	13,233	1,088,745	1,108,451
Total commercial	<u>10,091</u>	<u>197,976</u>	<u>8,073,895</u>	<u>8,281,962</u>
Consumer	275	6,908	437,488	444,671
Total	<u>\$ 118,271</u>	<u>\$ 566,259</u>	<u>\$ 27,924,599</u>	<u>\$ 28,609,129</u>



**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following table presents our nonaccrual loans and leases by loan portfolio segment and class and by with and without an allowance recorded as of the date indicated and interest income recognized on nonaccrual loans and leases for the periods indicated:

	March 31, 2023	Three Months Ended March 31, 2023	March 31, 2022	Three Months Ended March 31, 2022
	Nonaccrual Recorded Investment	Interest Income Recognized	Nonaccrual Recorded Investment	Interest Income Recognized
<i>(In thousands)</i>				
<b>With An Allowance Recorded:</b>				
Real estate mortgage:				
Commercial	\$ 60	\$ —	\$ 68	\$ —
Multi-family	—	—	—	—
Other residential	364	—	4,109	—
Real estate construction and land:				
Commercial	—	—	—	—
Residential	—	—	493	—
Commercial:				
Asset based	—	—	874	—
Venture capital	—	—	3,659	—
Other commercial	927	—	1,274	—
Consumer	525	—	387	—
<b>With No Related Allowance Recorded:</b>				
Real estate mortgage:				
Commercial	\$ 32,936	\$ 3	\$ 32,004	\$ 17
Multi-family	—	—	—	—
Other residential	49,696	—	13,982	—
Real estate construction and land:				
Commercial	—	—	—	—
Residential	—	—	5,093	—
Commercial:				
Asset based	420	—	449	—
Venture capital	—	—	—	—
Other commercial	2,196	1	4,146	354
Consumer	—	—	—	—
<b>Total Loans and Leases With and Without an Allowance Recorded:</b>				
Real estate mortgage	\$ 83,056	\$ 3	\$ 50,163	\$ 17
Real estate construction and land	—	—	5,586	—
Commercial	3,543	1	10,402	354
Consumer	525	—	387	—
<b>Total</b>	<b>\$ 87,124</b>	<b>\$ 4</b>	<b>\$ 66,538</b>	<b>\$ 371</b>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following tables present our loans held for investment by loan portfolio segment and class, by credit quality indicator (internal risk ratings), and by year of origination (vintage year) as of the dates indicated:

Amortized Cost Basis <sup>(1)</sup> March 31, 2023	Term Loans by Origination Year					Prior	Revolving Loans	Revolving Converted to Term Loans	Total
	2023	2022	2021	2020	2019				
<i>(In thousands)</i>									
<b>Real Estate Mortgage:</b>									
<b>Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ 4,935	\$ 2,712	\$ 10,178	\$ 27,110	\$ 40,532	\$ 1,305	\$ —	\$ 86,772
3-4 Pass	43,528	537,793	498,774	460,109	317,986	1,623,820	85,376	9,977	3,577,363
5 Special mention	—	—	—	724	14,957	93,339	—	—	109,020
6-8 Classified	—	—	552	458	1,265	33,321	—	—	35,596
<b>Total</b>	<b>\$ 43,528</b>	<b>\$ 542,728</b>	<b>\$ 502,038</b>	<b>\$ 471,469</b>	<b>\$ 361,318</b>	<b>\$ 1,791,012</b>	<b>\$ 86,681</b>	<b>\$ 9,977</b>	<b>\$ 3,808,751</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 6,926	\$ —	\$ —	\$ 6,926
<b>Real Estate Mortgage:</b>									
<b>Multi-family</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ 23,561	\$ 84,153	\$ 26,843	\$ 55,542	\$ 104,508	\$ —	\$ —	\$ 294,607
3-4 Pass	1,380	1,916,440	1,084,926	441,047	672,385	936,345	56,512	—	5,109,035
5 Special mention	—	—	—	37,211	29,430	49,451	—	—	116,092
6-8 Classified	—	—	—	—	—	3,586	—	—	3,586
<b>Total</b>	<b>\$ 1,380</b>	<b>\$ 1,940,001</b>	<b>\$ 1,169,079</b>	<b>\$ 505,101</b>	<b>\$ 757,357</b>	<b>\$ 1,093,890</b>	<b>\$ 56,512</b>	<b>\$ —</b>	<b>\$ 5,523,320</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Real Estate Mortgage:</b>									
<b>Other residential</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 1,500	\$ —	\$ 1,500
3-4 Pass	299,234	2,432,852	3,077,525	78,709	—	20,047	44,380	101	5,952,848
5 Special mention	—	18,810	26,000	—	—	—	—	—	44,810
6-8 Classified	(1,456)	26,587	41,041	7,683	—	2,368	—	159	76,382
<b>Total</b>	<b>\$ 297,778</b>	<b>\$ 2,478,249</b>	<b>\$ 3,144,566</b>	<b>\$ 86,392</b>	<b>\$ —</b>	<b>\$ 22,415</b>	<b>\$ 45,880</b>	<b>\$ 260</b>	<b>\$ 6,075,540</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ 1,600	\$ 1,214	\$ 91	\$ —	\$ 4	\$ —	\$ —	\$ 2,909

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Amortized Cost Basis <sup>(1)</sup> March 31, 2023	Term Loans by Origination Year						Revolving Loans	Revolving Converted to Term Loans	Total
	2023	2022	2021	2020	2019	Prior			
<i>(In thousands)</i>									
<b>Real Estate Construction and Land: Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
3-4 Pass	—	356,981	182,400	80,045	173,735	23,525	—	—	816,686
5 Special mention	—	—	—	—	—	93,641	—	—	93,641
6-8 Classified	—	—	—	—	—	—	—	—	—
<b>Total</b>	<b>\$ —</b>	<b>\$ 356,981</b>	<b>\$ 182,400</b>	<b>\$ 80,045</b>	<b>\$ 173,735</b>	<b>\$ 117,166</b>	<b>\$ —</b>	<b>\$ —</b>	<b>\$ 910,327</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Real Estate Construction and Land: Residential</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
3-4 Pass	10,606	810,532	1,592,751	869,174	206,942	128,373	34,738	—	3,653,116
5 Special mention	—	—	—	—	44,997	—	—	—	44,997
6-8 Classified	—	—	—	—	—	—	—	—	—
<b>Total</b>	<b>\$ 10,606</b>	<b>\$ 810,532</b>	<b>\$ 1,592,751</b>	<b>\$ 869,174</b>	<b>\$ 251,939</b>	<b>\$ 128,373</b>	<b>\$ 34,738</b>	<b>\$ —</b>	<b>\$ 3,698,113</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Commercial: Asset-Based</b>									
Internal risk rating:									
1-2 High pass	\$ 1,493	\$ 270,573	\$ 219,771	\$ 46,719	\$ 148,394	\$ 319,219	\$ (20)	\$ —	\$ 1,006,149
3-4 Pass	30,268	351,394	170,393	47,637	33,991	44,076	349,019	1,847	1,028,625
5 Special mention	—	177	—	—	—	14,473	18,451	32	33,133
6-8 Classified	—	—	—	—	—	420	—	—	420
<b>Total</b>	<b>\$ 31,761</b>	<b>\$ 622,144</b>	<b>\$ 390,164</b>	<b>\$ 94,356</b>	<b>\$ 182,385</b>	<b>\$ 378,188</b>	<b>\$ 367,450</b>	<b>\$ 1,879</b>	<b>\$ 2,068,327</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Commercial: Venture Capital</b>									
Internal risk rating:									
1-2 High pass	\$ (53)	\$ (16)	\$ —	\$ 1,999	\$ —	\$ 27	\$ 174,702	\$ (557)	\$ 176,102
3-4 Pass	(10)	137,072	146,732	22,178	3,711	2,173	1,375,198	66,044	1,753,098
5 Special mention	—	14,303	42,585	4,484	22,258	—	37,799	4,993	126,422
6-8 Classified	—	—	2,615	—	—	—	—	—	2,615
<b>Total</b>	<b>\$ (63)</b>	<b>\$ 151,359</b>	<b>\$ 191,932</b>	<b>\$ 28,661</b>	<b>\$ 25,969</b>	<b>\$ 2,200</b>	<b>\$ 1,587,699</b>	<b>\$ 70,480</b>	<b>\$ 2,058,237</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Amortized Cost Basis <sup>(1)</sup> March 31, 2023	Term Loans by Origination Year						Revolving Loans	Revolving Converted to Term Loans	Total
	2023	2022	2021	2020	2019	Prior			
<i>(In thousands)</i>									
<b>Commercial: Other Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ 655	\$ 2,328	\$ 8,215	\$ (20)	\$ 65	\$ (36)	\$ 21,365	\$ —	\$ 32,572
3-4 Pass	3,579	96,573	274,960	51,500	37,466	127,936	456,166	3,629	1,051,809
5 Special mention	—	—	317	151	610	2,386	1,488	84	5,036
6-8 Classified	—	6,702	—	—	300	2,542	2,725	857	13,126
Total	<u>\$ 4,234</u>	<u>\$ 105,603</u>	<u>\$ 283,492</u>	<u>\$ 51,631</u>	<u>\$ 38,441</u>	<u>\$ 132,828</u>	<u>\$ 481,744</u>	<u>\$ 4,570</u>	<u>\$ 1,102,543</u>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 47	\$ 90	\$ 137
<b>Consumer</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ 32	\$ 28	\$ 6	\$ —	\$ —	\$ 1,041	\$ —	\$ 1,107
3-4 Pass	66	61,167	217,470	19,885	45,584	64,999	9,245	—	418,416
5 Special mention	—	1,379	3,557	451	1,225	250	140	—	7,002
6-8 Classified	—	—	356	38	176	108	1	19	698
Total	<u>\$ 66</u>	<u>\$ 62,578</u>	<u>\$ 221,411</u>	<u>\$ 20,380</u>	<u>\$ 46,985</u>	<u>\$ 65,357</u>	<u>\$ 10,427</u>	<u>\$ 19</u>	<u>\$ 427,223</u>
Current YTD period:									
Gross charge-offs	\$ —	\$ 79	\$ 31	\$ —	\$ 144	\$ 170	\$ 1	\$ —	\$ 425
<b>Total Loans and Leases</b>									
Internal risk rating:									
1-2 High pass	\$ 2,095	\$ 301,413	\$ 314,879	\$ 85,725	\$ 231,111	\$ 464,250	\$ 199,893	\$ (557)	\$ 1,598,809
3-4 Pass	388,651	6,700,804	7,245,931	2,070,284	1,491,800	2,971,294	2,410,634	81,598	23,360,996
5 Special mention	—	34,669	72,459	43,021	113,477	253,540	57,878	5,109	580,153
6-8 Classified	(1,456)	33,289	44,564	8,179	1,741	42,345	2,726	1,035	132,423
Total	<u>\$ 389,290</u>	<u>\$ 7,070,175</u>	<u>\$ 7,677,833</u>	<u>\$ 2,207,209</u>	<u>\$ 1,838,129</u>	<u>\$ 3,731,429</u>	<u>\$ 2,671,131</u>	<u>\$ 87,185</u>	<u>\$ 25,672,381</u>
Current YTD period:									
Gross charge-offs	\$ —	\$ 1,679	\$ 1,245	\$ 91	\$ 144	\$ 7,100	\$ 48	\$ 90	\$ 10,397

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Amortized Cost Basis <sup>(1)</sup> December 31, 2022	Term Loans by Origination Year					Prior	Revolving Loans	Revolving Converted to Term Loans	Total
	2022	2021	2020	2019	2018				
<i>(In thousands)</i>									
<b>Real Estate Mortgage:</b>									
<b>Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ 4,957	\$ 3,791	\$ 7,215	\$ 26,132	\$ 4,690	\$ 35,343	\$ 1,290	\$ —	\$ 83,418
3-4 Pass	537,931	501,576	467,792	322,448	539,701	1,148,386	85,284	10,065	3,613,183
5 Special mention	—	—	728	16,394	2,294	87,077	—	—	106,493
6-8 Classified	—	559	464	1,310	27,396	14,008	—	—	43,737
Total	\$ 542,888	\$ 505,926	\$ 476,199	\$ 366,284	\$ 574,081	\$ 1,284,814	\$ 86,574	\$ 10,065	\$ 3,846,831
Current YTD period:									
Gross charge-offs	\$ —	\$ 67	\$ —	\$ 79	\$ 2,258	\$ 326	\$ —	\$ —	\$ 2,730
<b>Real Estate Mortgage:</b>									
<b>Multi-family</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ 89,251	\$ 19,945	\$ 58,275	\$ 66,219	\$ 69,805	\$ —	\$ —	\$ 303,495
3-4 Pass	1,940,337	1,084,467	523,645	676,169	446,987	511,185	57,639	—	5,240,429
5 Special mention	—	—	4,944	16,974	7,003	31,409	—	—	60,330
6-8 Classified	—	—	—	—	2,750	861	—	—	3,611
Total	\$ 1,940,337	\$ 1,173,718	\$ 548,534	\$ 751,418	\$ 522,959	\$ 613,260	\$ 57,639	\$ —	\$ 5,607,865
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Real Estate Mortgage:</b>									
<b>Other residential</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 1,000	\$ —	\$ 1,000
3-4 Pass	2,805,533	3,200,013	83,580	—	237	20,394	46,155	96	6,156,008
5 Special mention	27,272	25,766	4,916	—	109	—	—	—	58,063
6-8 Classified	19,248	33,218	5,333	—	—	2,555	—	203	60,557
Total	\$ 2,852,053	\$ 3,258,997	\$ 93,829	\$ —	\$ 346	\$ 22,949	\$ 47,155	\$ 299	\$ 6,275,628
Current YTD period:									
Gross charge-offs	\$ 249	\$ 1,084	\$ 912	\$ —	\$ —	\$ 81	\$ —	\$ —	\$ 2,326

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Amortized Cost Basis <sup>(1)</sup> December 31, 2022	Term Loans by Origination Year					Prior	Revolving Loans	Revolving Converted to Term Loans	Total
	2022	2021	2020	2019	2018				
<i>(In thousands)</i>									
<b>Real Estate Construction and Land: Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
3-4 Pass	299,538	170,397	74,634	237,294	17,763	7,632	—	—	807,258
5 Special mention	—	—	—	—	91,334	—	—	—	91,334
6-8 Classified	—	—	—	—	—	—	—	—	—
<b>Total</b>	<b>\$ 299,538</b>	<b>\$ 170,397</b>	<b>\$ 74,634</b>	<b>\$ 237,294</b>	<b>\$ 109,097</b>	<b>\$ 7,632</b>	<b>\$ —</b>	<b>\$ —</b>	<b>\$ 898,592</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Real Estate Construction and Land: Residential</b>									
Internal risk rating:									
1-2 High pass	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
3-4 Pass	605,683	1,302,061	844,041	282,076	125,805	204	48,555	—	3,208,425
5 Special mention	—	—	—	45,155	—	—	—	—	45,155
6-8 Classified	—	—	—	—	—	—	—	—	—
<b>Total</b>	<b>\$ 605,683</b>	<b>\$ 1,302,061</b>	<b>\$ 844,041</b>	<b>\$ 327,231</b>	<b>\$ 125,805</b>	<b>\$ 204</b>	<b>\$ 48,555</b>	<b>\$ —</b>	<b>\$ 3,253,580</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —
<b>Commercial: Asset-Based</b>									
Internal risk rating:									
1-2 High pass	\$ 225,140	\$ 209,272	\$ 57,727	\$ 202,063	\$ 121,600	\$ 208,542	\$ 850,031	\$ —	\$ 1,874,375
3-4 Pass	547,675	188,269	52,711	35,811	33,426	40,714	2,239,785	69,742	3,208,133
5 Special mention	—	—	—	43,409	—	3,505	9,922	—	56,836
6-8 Classified	—	—	—	—	—	434	—	431	865
<b>Total</b>	<b>\$ 772,815</b>	<b>\$ 397,541</b>	<b>\$ 110,438</b>	<b>\$ 281,283</b>	<b>\$ 155,026</b>	<b>\$ 253,195</b>	<b>\$ 3,099,738</b>	<b>\$ 70,173</b>	<b>\$ 5,140,209</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 750	\$ —	\$ 750
<b>Commercial: Venture Capital</b>									
Internal risk rating:									
1-2 High pass	\$ (40)	\$ —	\$ 2,000	\$ —	\$ 134	\$ 3	\$ 216,535	\$ 503	\$ 219,135
3-4 Pass	92,015	136,296	18,075	3,705	1,833	910	1,365,101	65,572	1,683,507
5 Special mention	13,970	40,924	4,483	23,202	—	—	40,335	4,993	127,907
6-8 Classified	—	2,753	—	—	—	—	—	—	2,753
<b>Total</b>	<b>\$ 105,945</b>	<b>\$ 179,973</b>	<b>\$ 24,558</b>	<b>\$ 26,907</b>	<b>\$ 1,967</b>	<b>\$ 913</b>	<b>\$ 1,621,971</b>	<b>\$ 71,068</b>	<b>\$ 2,033,302</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ —	\$ —	\$ —	\$ —	\$ —	\$ 940	\$ —	\$ 940

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Amortized Cost Basis <sup>(1)</sup>	Term Loans by Origination Year					Revolving	Revolving Converted to Term	Total	
December 31, 2022	2022	2021	2020	2019	2018	Prior	Loans	Loans	Total
	(In thousands)								
<b>Commercial: Other</b>									
<b>Commercial</b>									
Internal risk rating:									
1-2 High pass	\$ 3,591	\$ 10,880	\$ 12	\$ 161	\$ 3	\$ 14	\$ 20,958	\$ —	\$ 35,619
3-4 Pass	84,930	278,208	54,542	41,908	47,771	87,645	454,438	3,684	1,053,126
5 Special mention	7,038	796	184	695	1,526	2,858	47	89	13,233
6-8 Classified	—	806	—	319	(3)	2,653	1,600	1,098	6,473
<b>Total</b>	<b>\$ 95,559</b>	<b>\$ 290,690</b>	<b>\$ 54,738</b>	<b>\$ 43,083</b>	<b>\$ 49,297</b>	<b>\$ 93,170</b>	<b>\$ 477,043</b>	<b>\$ 4,871</b>	<b>\$ 1,108,451</b>
Current YTD period:									
Gross charge-offs	\$ —	\$ 209	\$ —	\$ 1	\$ —	\$ 2,537	\$ 1,906	\$ 474	\$ 5,127
<b>Consumer</b>									
Internal risk rating:									
1-2 High pass	\$ 34	\$ 30	\$ 7	\$ —	\$ 1	\$ —	\$ 854	\$ —	\$ 926
3-4 Pass	62,868	226,084	20,798	48,542	31,693	37,838	8,739	—	436,562
5 Special mention	1,252	3,490	464	1,126	278	238	60	—	6,908
6-8 Classified	47	—	—	59	79	74	—	16	275
<b>Total</b>	<b>\$ 64,201</b>	<b>\$ 229,604</b>	<b>\$ 21,269</b>	<b>\$ 49,727</b>	<b>\$ 32,051</b>	<b>\$ 38,150</b>	<b>\$ 9,653</b>	<b>\$ 16</b>	<b>\$ 444,671</b>
Current YTD period:									
Gross charge-offs	\$ 309	\$ 529	\$ 237	\$ 728	\$ —	\$ 354	\$ —	\$ 7	\$ 2,164
<b>Total Loans and Leases</b>									
Internal risk rating:									
1-2 High pass	\$ 233,682	\$ 313,224	\$ 86,906	\$ 286,631	\$ 192,647	\$ 313,707	\$ 1,090,668	\$ 503	\$ 2,517,968
3-4 Pass	6,976,510	7,087,371	2,139,818	1,647,953	1,245,216	1,854,908	4,305,696	149,159	25,406,631
5 Special mention	49,532	70,976	15,719	146,955	102,544	125,087	50,364	5,082	566,259
6-8 Classified	19,295	37,336	5,797	1,688	30,222	20,585	1,600	1,748	118,271
<b>Total</b>	<b>\$ 7,279,019</b>	<b>\$ 7,508,907</b>	<b>\$ 2,248,240</b>	<b>\$ 2,083,227</b>	<b>\$ 1,570,629</b>	<b>\$ 2,314,287</b>	<b>\$ 5,448,328</b>	<b>\$ 156,492</b>	<b>\$ 28,609,129</b>
Current YTD period:									
Gross charge-offs	\$ 558	\$ 1,889	\$ 1,149	\$ 808	\$ 2,258	\$ 3,298	\$ 3,596	\$ 481	\$ 14,037

(1) Amounts with negative balances are loans with zero principal balances and deferred loan origination fees.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

On January 1, 2023, the Company adopted ASU 2022-02, "Financial Instruments - Credit Losses (Topic 326): Troubled Debt Restructurings and Vintage Disclosures", which eliminated the accounting guidance for troubled debt restructurings while enhancing disclosure requirements for certain loan refinancing and restructurings by creditors when a borrower is experiencing financial difficulty. This guidance was applied on a prospective basis. The following table presents our loan modifications made to borrowers experiencing financial difficulty by type of modification for the period indicated with related amortized cost balances as of the date indicated:

<b>Three Months Ended March 31, 2023</b>											
<b>Loan Modifications</b>											
<b>Balances (Amortized Cost Basis) at March 31, 2023</b>											
<b>Combination - Term</b>											
<b>Term Extension</b>		<b>Payment Delay</b>		<b>Extension and Interest Rate Reduction</b>		<b>Combination - Term Extension and Payment Delay</b>		<b>Total Loan Modifications</b>			
<b>% of Loan Portfolio</b>		<b>% of Loan Portfolio</b>		<b>% of Loan Portfolio</b>		<b>% of Loan Portfolio</b>		<b>% of Loan Portfolio</b>			
<b>Balance</b>	<b>Class</b>	<b>Balance</b>	<b>Class</b>	<b>Balance</b>	<b>Class</b>	<b>Balance</b>	<b>Class</b>	<b>Balance</b>	<b>Class</b>		
<i>(Dollars in thousands)</i>											
Real estate mortgage:											
Other residential											
\$ 12,716	0.2 %	\$ —	— %	\$ —	— %	\$ —	— %	\$ 12,716	0.2 %		
Commercial:											
Venture capital											
—	— %	—	— %	—	— %	613	— %	613	— %		
Other commercial											
2,057	0.2 %	45	— %	—	— %	—	— %	2,102	0.2 %		
Consumer											
—	— %	—	— %	3	— %	—	— %	3	— %		
<u>\$ 14,773</u>		<u>\$ 45</u>		<u>\$ 3</u>		<u>\$ 613</u>		<u>\$ 15,434</u>			

The following tables present the financial effect of our loan modifications made to borrowers experiencing financial difficulty by type of modification for the period indicated:

<b>Three Months Ended March 31, 2023</b>	
<b>Term Extension - Financial Effect</b>	
Real estate mortgage:	
Other residential	Extended maturity by a weighted average seven months.
Commercial:	
Other commercial	Extended maturity by a weighted average 12 months.
<b>Three Months Ended March 31, 2023</b>	
<b>Payment Delay - Financial Effect</b>	
Commercial:	
Other commercial	Provided six months of reduced payments to borrowers without extending the loan term.



**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**Three Months Ended March 31, 2023**  
**Combination - Term Extension and Interest Rate Reduction**

Consumer	Extended maturity by a weighted average 2 years and reduced weighted average contractual interest rate from 9.5% to 2.0%.
----------	---

**Three Months Ended March 31, 2023**  
**Combination - Term Extension and Payment Delay**

Commercial:	
Venture capital	Extended maturity by a weighted average 11 months and provided 11 months of interest only payments to borrowers.

The following table presents the payment status of our loan modifications made during the period indicated with related amortized cost balances as of the date indicated:

	<b>Three Months Ended March 31, 2023</b>			
	<b>Loan Modifications</b>			
	<b>Payment Status (Amortized Cost Basis) at</b>			
	<b>March 31, 2023</b>			
	<b>Current</b>	<b>30-89 Days Past Due</b>	<b>90 or More Days Past Due</b>	<b>Total</b>
	<i>(In thousands)</i>			
Real estate mortgage:				
Commercial	\$ —	\$ —	\$ —	\$ —
Multi-family	—	—	—	—
Other residential	8,780	3,936	—	12,716
Real estate construction and land:				
Commercial	—	—	—	—
Residential	—	—	—	—
Commercial:				
Asset-based	—	—	—	—
Venture capital	613	—	—	613
Other commercial	2,102	—	—	2,102
Consumer	3	—	—	3
<b>Total</b>	<b>\$ 11,498</b>	<b>\$ 3,936</b>	<b>\$ —</b>	<b>\$ 15,434</b>

TDRs are a result of rate reductions, term extensions, fee concessions, transfers to foreclosed assets, discounted loan payoffs, and debt forgiveness, or a combination thereof. The following table presents our troubled debt restructurings of loans held for investment by loan portfolio segment and class for the period indicated:

	<b>Three Months Ended March 31, 2022</b>		
	<b>Number of Loans</b>	<b>Pre- Modification Outstanding Recorded Investment</b>	<b>Post- Modification Outstanding Recorded Investment</b>
		<i>(In thousands)</i>	
<b>Troubled Debt Restructurings</b>			
Real estate mortgage:			
Multi-family	1	\$ 304	\$ —
Commercial:			
Other commercial	13	1,074	1,074
<b>Total</b>	<b>14</b>	<b>\$ 1,378</b>	<b>\$ 1,074</b>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

During the three months ended March 31, 2022, there were two other commercial loans totaling \$78,000 restructured in the preceding 12-month period that subsequently defaulted.

**Leases Receivable**

We provide equipment financing to our customers primarily with operating and direct financing leases. For direct financing leases, lease receivables are recorded on the balance sheet but the leased equipment is not, although we generally retain legal title to the leased equipment until the end of each lease. Direct financing leases are stated at the net amount of minimum lease payments receivable, plus any unguaranteed residual value, less the amount of unearned income and net acquisition discount at the reporting date. Direct lease origination costs are amortized using the effective interest method over the life of the leases. Direct financing leases are subject to our accounting for allowance for loan and lease losses. See Note 8. *Leases* for information regarding operating leases where we are the lessor.

The following table provides the components of leases receivable income for the periods indicated:

	Three Months Ended March 31,	
	2023	2022
	<i>(In thousands)</i>	
<b>Component of leases receivable income:</b>		
Interest income on net investments in leases	\$ 3,749	\$ 2,388

The following table presents the components of leases receivable as of the dates indicated:

	March 31, 2023		December 31, 2022	
	<i>(In thousands)</i>			
	<b>Net Investment in Direct Financing Leases:</b>			
Lease payments receivable	\$ 235,396	\$	232,909	
Unguaranteed residual assets	23,866		23,561	
Deferred costs and other	1,781		1,815	
Aggregate net investment in leases	\$ 261,043	\$	258,285	

The following table presents maturities of leases receivable as of the date indicated:

	March 31, 2023	
	<i>(In thousands)</i>	
<b>Period ending December 31,</b>		
2023	\$	55,009
2024		73,615
2025		55,299
2026		36,835
2027		23,704
Thereafter		18,570
Total undiscounted cash flows		263,032
Less: Unearned income		(27,636)
Present value of lease payments	\$	235,396

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**Allowance for Loan and Lease Losses**

The following tables present a summary of the activity in the allowance for loan and lease losses on loans and leases held for investment by loan portfolio segment for the periods indicated:

	Three Months Ended March 31, 2023				
	Real Estate Mortgage	Real Estate Construction and Land	Commercial	Consumer	Total
	<i>(In thousands)</i>				
<b>Allowance for Loan and Lease Losses:</b>					
Balance, beginning of period	\$ 87,309	\$ 52,320	\$ 52,849	\$ 8,254	\$ 200,732
Charge-offs	(9,835)	—	(137)	(425)	(10,397)
Recoveries	200	—	975	45	1,220
Net (charge-offs) recoveries	(9,635)	—	838	(380)	(9,177)
Provision	31,809	2,714	(16,492)	469	18,500
Balance, end of period	<u>\$ 109,483</u>	<u>\$ 55,034</u>	<u>\$ 37,195</u>	<u>\$ 8,343</u>	<u>\$ 210,055</u>
<b>Ending Allowance by Evaluation Methodology:</b>					
Individually evaluated	\$ —	\$ —	\$ —	\$ —	\$ —
Collectively evaluated	<u>\$ 109,483</u>	<u>\$ 55,034</u>	<u>\$ 37,195</u>	<u>\$ 8,343</u>	<u>\$ 210,055</u>
<b>Ending Loans and Leases by Evaluation Methodology:</b>					
Individually evaluated	\$ 82,835	\$ —	\$ 2,616	\$ —	\$ 85,451
Collectively evaluated	15,324,776	4,608,440	5,226,491	427,223	25,586,930
Ending balance	<u>\$ 15,407,611</u>	<u>\$ 4,608,440</u>	<u>\$ 5,229,107</u>	<u>\$ 427,223</u>	<u>\$ 25,672,381</u>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Three Months Ended March 31, 2022

	Real Estate Mortgage	Real Estate Construction and Land	Commercial	Consumer	Total
<i>(In thousands)</i>					
<b>Allowance for Loan and Lease Losses:</b>					
Balance, beginning of period	\$ 98,624	\$ 44,508	\$ 48,718	\$ 8,714	\$ 200,564
Charge-offs	(168)	—	(2,833)	(233)	(3,234)
Recoveries	163	149	1,735	21	2,068
Net (charge-offs) recoveries	(5)	149	(1,098)	(212)	(1,166)
Provision	(11,391)	(1,009)	9,436	964	(2,000)
Balance, end of period	<u>\$ 87,228</u>	<u>\$ 43,648</u>	<u>\$ 57,056</u>	<u>\$ 9,466</u>	<u>\$ 197,398</u>
<b>Ending Allowance by Evaluation Methodology:</b>					
Individually evaluated	\$ 156	\$ —	\$ 1,023	\$ —	\$ 1,179
Collectively evaluated	<u>\$ 87,072</u>	<u>\$ 43,648</u>	<u>\$ 56,033</u>	<u>\$ 9,466</u>	<u>\$ 196,219</u>
<b>Ending Loans and Leases by Evaluation Methodology:</b>					
Individually evaluated	\$ 51,280	\$ 6,515	\$ 17,813	\$ —	\$ 75,608
Collectively evaluated	12,457,784	3,217,201	8,096,882	504,597	24,276,464
Ending balance	<u>\$ 12,509,064</u>	<u>\$ 3,223,716</u>	<u>\$ 8,114,695</u>	<u>\$ 504,597</u>	<u>\$ 24,352,072</u>

The allowance for loan and lease losses increased by \$9.3 million in the first quarter of 2023 to \$210.1 million due primarily to a provision for loan and lease losses of \$18.5 million driven by an increase in qualitative reserves for loans secured by commercial real estate and higher net charge-offs, offset partially by a decline in the balances of loans and leases held for investment. For additional information regarding the calculation of the allowance for loan and lease losses using the CECL methodology, including discussion of forecasts used to estimate the allowance, please see Note 1(j). *Nature of Operations and Summary of Significant Accounting Policies - Allowance for Credit Losses on Loans and Leases Held for Investment* of the Notes to Consolidated Financial Statements contained in "Item 8. Financial Statements and Supplementary Data" of the Form 10-K.

A loan is considered collateral-dependent, and is individually evaluated for reserve purposes, when the borrower is experiencing financial difficulty and repayment is expected to be provided substantially through the operation or sale of the collateral. The following table summarizes collateral-dependent loans held for investment by collateral type as of the following dates:

	March 31, 2023			December 31, 2022		
	Real Property	Business Assets	Total	Real Property	Business Assets	Total
<i>(In thousands)</i>						
Real estate mortgage	\$ 81,541	\$ —	\$ 81,541	\$ 90,485	\$ —	\$ 90,485
Real estate construction and land	—	—	—	1,402	—	1,402
Commercial	—	420	420	—	434	434
Total	<u>\$ 81,541</u>	<u>\$ 420</u>	<u>\$ 81,961</u>	<u>\$ 91,887</u>	<u>\$ 434</u>	<u>\$ 92,321</u>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

***Allowance for Credit Losses***

The allowance for credit losses is the combination of the allowance for loan and lease losses and the reserve for unfunded loan commitments. The reserve for unfunded loan commitments is included within "Accrued interest payable and other liabilities" on the condensed consolidated balance sheets.

The following tables present a summary of the activity in the allowance for loan and lease losses and reserve for unfunded loan commitments for the periods indicated:

	<b>Three Months Ended March 31, 2023</b>		
	<b>Allowance for Loan and Lease Losses</b>	<b>Reserve for Unfunded Loan Commitments</b>	<b>Total Allowance for Credit Losses</b>
	<i>(In thousands)</i>		
Balance, beginning of period	\$ 200,732	\$ 91,071	\$ 291,803
Charge-offs	(10,397)	—	(10,397)
Recoveries	1,220	—	1,220
Net charge-offs	(9,177)	—	(9,177)
Provision	18,500	(15,500)	3,000
Balance, end of period	<u>\$ 210,055</u>	<u>\$ 75,571</u>	<u>\$ 285,626</u>

	<b>Three Months Ended March 31, 2022</b>		
	<b>Allowance for Loan and Lease Losses</b>	<b>Reserve for Unfunded Loan Commitments</b>	<b>Total Allowance for Credit Losses</b>
	<i>(In thousands)</i>		
Balance, beginning of period	\$ 200,564	\$ 73,071	\$ 273,635
Charge-offs	(3,234)	—	(3,234)
Recoveries	2,068	—	2,068
Net charge-offs	(1,166)	—	(1,166)
Provision	(2,000)	2,000	—
Balance, end of period	<u>\$ 197,398</u>	<u>\$ 75,071</u>	<u>\$ 272,469</u>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 5. FORECLOSED ASSETS, NET**

The following table summarizes foreclosed assets, net of the valuation allowance, as of the dates indicated:

<b>Property Type</b>	<b>March 31, 2023</b>	<b>December 31, 2022</b>
	<i>(In thousands)</i>	
Commercial real estate	\$ —	\$ —
Single-family residence	2,135	5,022
Total other real estate owned, net	2,135	5,022
Other foreclosed assets	—	—
Total foreclosed assets, net	\$ 2,135	\$ 5,022

The following table presents the changes in foreclosed assets, net of the valuation allowance, for the period indicated:

	<b>Foreclosed Assets, Net</b>
	<i>(In thousands)</i>
Balance, December 31, 2022	\$ 5,022
Transfers to foreclosed assets from loans	2,568
Provision for losses	(527)
Reductions related to sales	(4,928)
Balance, March 31, 2023	\$ 2,135

**NOTE 6. GOODWILL AND OTHER INTANGIBLE ASSETS, NET**

Goodwill and other intangible assets arise from the acquisition method of accounting for business combinations. Goodwill and other intangible assets generated from business combinations and deemed to have indefinite lives are not subject to amortization and instead are tested for impairment annually at the reporting unit level unless a triggering event occurs thereby requiring an updated assessment. Our regular annual impairment assessment occurs in the fourth quarter. Goodwill represents the excess of the purchase price over the fair value of the net assets and other identifiable intangible assets acquired. Impairment exists when the carrying value of the goodwill exceeds the fair value of the reporting unit. An impairment loss would be recognized in an amount equal to that excess as a charge to "Noninterest expense" in the condensed consolidated statements of earnings.

The impact to banks triggered by the closure of two well-known regional banks caused a significant decline in bank stock prices in March 2023, including our stock price. These triggering events indicated that goodwill related to our single reporting unit may be impaired and resulted in us performing a goodwill impairment assessment in the first quarter of 2023. We applied the market approach using an average share price of the Company's stock and a control premium to determine the estimated fair value of the reporting unit. The control premium was based upon management's judgment using historical information of control premiums for completed bank acquisitions. As a result, we recorded a goodwill impairment charge of our entire goodwill balance of \$1.4 billion in the first quarter of 2023 as the estimated fair value of equity was less than book value. This was a non-cash charge to earnings and had no impact on our regulatory capital ratios, cash flows, or liquidity position.

The following table presents the changes in the carrying amount of goodwill for the period indicated:

	<b>Goodwill</b>
	<i>(In thousands)</i>
Balance, December 31, 2022	\$ 1,376,736
Impairment	(1,376,736)
Balance, March 31, 2023	\$ —

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Our other intangible assets with definite lives are CDI and CRI. CDI and CRI are amortized over their respective estimated useful lives and reviewed for impairment at least quarterly. The amortization expense represents the estimated decline in the value of the underlying deposits or customer relationships acquired.

The following table presents the changes in CDI and CRI and the related accumulated amortization for the periods indicated:

	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<i>(In thousands)</i>	
<b>Gross Amount of CDI and CRI:</b>		
Balance, beginning of period	\$ 91,550	\$ 133,850
Fully amortized portion	(750)	—
Balance, end of period	90,800	133,850
<b>Accumulated Amortization:</b>		
Balance, beginning of period	(60,169)	(88,893)
Amortization expense	(2,411)	(3,649)
Fully amortized portion	750	—
Balance, end of period	(61,830)	(92,542)
Net CDI and CRI, end of period	\$ 28,970	\$ 41,308

The following table presents the estimated aggregate future amortization expense for our current CDI and CRI as of the date indicated:

	<b>March 31, 2023</b>	
	<i>(In thousands)</i>	
Period ending December 31,		
2023	\$	6,674
2024		6,404
2025		4,087
2026		3,481
2027		2,876
Thereafter		5,448
Net CDI and CRI	\$	28,970

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 7. OTHER ASSETS**

The following table presents the detail of our other assets as of the dates indicated:

<u>Other Assets</u>	<u>March 31,</u> <u>2023</u>	<u>December 31,</u> <u>2022</u>
	<i>(In thousands)</i>	
Deferred tax asset, net	\$ 342,557	\$ 281,848
LIHTC investments	329,216	328,555
Cash surrender value of BOLI	207,402	207,797
Interest receivable	173,209	157,109
Operating lease ROU assets, net <sup>(1)</sup>	120,828	126,255
Taxes receivable	83,327	89,924
SBIC investments	65,301	62,227
Equity investments without readily determinable fair values	64,387	63,280
Prepaid expenses	36,730	26,752
Equity warrants <sup>(2)</sup>	3,978	4,048
Equity investments with readily determinable fair values	1	1
Other receivables/assets	176,533	148,834
Total other assets	\$ 1,603,469	\$ 1,496,630

(1) See Note 8. *Leases* for further details regarding the operating lease ROU assets.

(2) See Note 10. *Derivatives* for information regarding equity warrants.

**NOTE 8. LEASES**

***Operating Leases as a Lessee***

Our lease expense is a component of "Occupancy expense" on our condensed consolidated statements of earnings. The following table presents the components of lease expense for the periods indicated:

	<u>Three Months Ended</u> <u>March 31,</u>	
	<u>2023</u>	<u>2022</u>
	<i>(In thousands)</i>	
Operating lease expense:		
Fixed costs	\$ 7,748	\$ 8,479
Variable costs	35	23
Short-term lease costs	357	364
Sublease income	(712)	(1,076)
Net lease expense	\$ 7,428	\$ 7,790

The following table presents supplemental cash flow information related to leases for the periods indicated:

	<u>Three Months Ended</u> <u>March 31,</u>	
	<u>2023</u>	<u>2022</u>
	<i>(In thousands)</i>	
Cash paid for amounts included in the measurement of lease liabilities:		
Operating cash flows from operating leases	\$ 8,963	\$ 8,839
ROU assets obtained in exchange for lease obligations:		
Operating leases	\$ 2,196	\$ 17,301



**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following table presents supplemental balance sheet and other information related to operating leases as of the dates indicated:

	March 31, 2023	December 31, 2022
<i>(Dollars in thousands)</i>		
<b>Operating leases:</b>		
Operating lease right-of-use assets, net	\$ 120,828	\$ 126,255
Operating lease liabilities	\$ 142,027	\$ 148,401
Weighted average remaining lease term (in years)	6.4	6.6
Weighted average discount rate	2.54 %	2.64 %

The following table presents the maturities of operating lease liabilities as of the date indicated:

	March 31, 2023 <i>(In thousands)</i>
<b>Period ending December 31,</b>	
2023	\$ 24,867
2024	30,594
2025	26,922
2026	21,950
2027	15,802
Thereafter	52,415
Total operating lease liabilities	172,550
Less: Imputed interest	(30,523)
Present value of operating lease liabilities	\$ 142,027

***Operating Leases as a Lessor***

We provide equipment financing to our customers through operating leases where we facilitate the purchase of equipment leased to our customers. The equipment is shown on the condensed consolidated balance sheets as "Equipment leased to others under operating leases" and is depreciated to its estimated residual value at the end of the lease term, shown as "Leased equipment depreciation" in the condensed consolidated statements of earnings, according to our fixed asset accounting policy. We receive periodic rental income payments under the leases, which are recorded as "Noninterest Income" in the condensed consolidated statements of earnings. The equipment is tested periodically for impairment. No impairment was recorded on "Equipment leased to others under operating leases" during the three months ended March 31, 2023 and 2022.

The following table presents the rental payments to be received on operating leases as of the date indicated:

	March 31, 2023 <i>(In thousands)</i>
<b>Period ending December 31,</b>	
2023	\$ 39,565
2024	50,938
2025	40,715
2026	34,486
2027	26,154
Thereafter	79,739
Total undiscounted cash flows	\$ 271,597

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 9. BORROWINGS AND SUBORDINATED DEBT**

***Borrowings***

The following table summarizes our borrowings as of the dates indicated:

	March 31, 2023		December 31, 2022	
	Balance	Weighted Average Rate	Balance	Weighted Average Rate
	<i>(Dollars in thousands)</i>			
FHLB secured advances	\$ 5,450,000	5.07 %	\$ 1,270,000	4.62 %
Bank Term Funding Program	4,910,000	4.38 %	—	— %
Repurchase agreement <sup>(1)</sup>	1,393,337	8.50 %	—	— %
Credit-linked notes	128,375	15.24 %	132,030	14.56 %
AFX short-term borrowings	—	— %	250,000	4.68 %
FHLB unsecured overnight advance	—	— %	112,000	4.37 %
<b>Total borrowings</b>	<b>\$ 11,881,712</b>	<b>5.30 %</b>	<b>\$ 1,764,030</b>	<b>5.36 %</b>

(1) Balance is net of unamortized issuance costs of \$17.9 million and \$0.4 million of accrued exit fees. Rate calculation does not include the effects of issuance costs and exit fees.

The Bank has established secured and unsecured lines of credit under which it may borrow funds from time to time on a term or overnight basis from the FHLB, the FRBSF, and other financial institutions.

*FHLB Secured Line of Credit.* The Bank had secured financing capacity with the FHLB as of March 31, 2023 of \$5.7 billion, collateralized by a blanket lien on \$9.7 billion of qualifying loans and \$133.4 million of securities. As of March 31, 2023, the balance outstanding was \$5.5 billion, which consisted of various term advances with maturity dates ranging from April 2023 to August 2023. As of December 31, 2022, the balance outstanding was \$1.3 billion, which consisted of an overnight advance and two term advances with maturity dates of January 2023 and February 2023.

*FRBSF Secured Line of Credit.* The Bank has a secured line of credit with the FRBSF. As of March 31, 2023, the Bank had secured borrowing capacity of \$5.6 billion collateralized by liens covering \$5.6 billion of qualifying loans and \$1.4 billion of securities. As of March 31, 2023 and December 31, 2022, there were no balances outstanding.

*FRBSF Bank Term Funding Program.* In March of 2023, the Bank participated in the FRBSF Bank Term Funding Program. As of March 31, 2023, the Bank had secured borrowing capacity of \$4.9 billion collateralized by the par value of pledged securities totaling \$4.9 billion. As of March 31, 2023, the balance outstanding was \$4.9 billion consisting of two term advances maturing in March 2024.

*Repurchase Agreement.* In March of 2023, the Bank entered into a repurchase agreement through which it borrowed \$1.4 billion that was collateralized by loans with a principal balance of \$2.1 billion. In connection with this borrowing, the Bank incurred \$17.9 million of issuance costs and accrued \$0.4 million in exit fees. The repurchase agreement is to be repaid with collections on the underlying loans. The repurchase agreement has a term of 18 months, under which the interest rate is 8.50% for amounts outstanding during the first nine months and 8.75% for amounts outstanding during the last nine months. The Bank has the option to pay off the repurchase agreement after the first nine months. Per the terms of the agreement, a reserve account equal to 1.5% of the facility commitment amount was deposited with a third-party bank to be used for certain purposes. Any remaining funds will be returned to PacWest at the time of payoff or maturity of the facility.

*Credit-Linked Notes.* The notes were issued in five classes, each with an interest rate of SOFR plus a spread that ranges from 8.00% to 13.25%, with a weighted average spread of 10.68% at March 31, 2023. The notes are linked to the credit risk of an approximately \$2.59 billion reference pool of previously purchased single-family residential mortgage loans at March 31, 2023. The notes are due June 27, 2052. Principal payments on the notes are based only on scheduled and unscheduled principal that is actually collected on these loans. The notes are reported at fair value of \$128.4 million at March 31, 2023. See Note 12. *Fair Value Option* for additional information.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

*Federal Funds Arrangements with Commercial Banks.* As of March 31, 2023, the Bank had unsecured lines of credit of \$130.0 million in the aggregate with several correspondent banks for the purchase of overnight funds, subject to availability of funds. These lines are renewable annually and have no unused commitment fees. As of March 31, 2023 and December 31, 2022, there were no balances outstanding. The Bank is a member of the AFX, through which it may either borrow or lend funds on an overnight or short-term basis with a group of pre-approved commercial banks. The availability of funds changes daily. As of March 31, 2023, there was no balance outstanding. As of December 31, 2022, the balance outstanding was \$250.0 million, which consisted of \$250.0 million in overnight borrowings.

**Subordinated Debt**

The following table summarizes the terms of each issuance of subordinated debt outstanding as of the dates indicated:

Series	March 31, 2023		December 31, 2022		Date Issued	Maturity Date	Rate Index (Quarterly Reset) <sup>(6)</sup>
	Balance	Rate <sup>(1)</sup>	Balance	Rate <sup>(1)</sup>			
	<i>(Dollars in thousands)</i>						
Subordinated notes, net <sup>(2)</sup>	\$ 395,262	3.25 %	\$ 395,134	3.25 %	4/30/2021	5/1/2031	Fixed rate <sup>(3)</sup>
Trust V	10,310	8.01 %	10,310	7.84 %	8/15/2003	9/17/2033	3-month LIBOR + 3.10
Trust VI	10,310	7.92 %	10,310	7.82 %	9/3/2003	9/15/2033	3-month LIBOR + 3.05
Trust CII	5,155	7.86 %	5,155	7.69 %	9/17/2003	9/17/2033	3-month LIBOR + 2.95
Trust VII	61,856	7.55 %	61,856	7.16 %	2/5/2004	4/23/2034	3-month LIBOR + 2.75
Trust CIII	20,619	6.56 %	20,619	6.46 %	8/15/2005	9/15/2035	3-month LIBOR + 1.69
Trust FCCI	16,495	6.47 %	16,495	6.37 %	1/25/2007	3/15/2037	3-month LIBOR + 1.60
Trust FCBI	10,310	6.42 %	10,310	6.32 %	9/30/2005	12/15/2035	3-month LIBOR + 1.55
Trust CS 2005-1	82,475	6.82 %	82,475	6.72 %	11/21/2005	12/15/2035	3-month LIBOR + 1.95
Trust CS 2005-2	128,866	6.75 %	128,866	6.36 %	12/14/2005	1/30/2036	3-month LIBOR + 1.95
Trust CS 2006-1	51,545	6.75 %	51,545	6.36 %	2/22/2006	4/30/2036	3-month LIBOR + 1.95
Trust CS 2006-2	51,550	6.75 %	51,550	6.36 %	9/27/2006	10/30/2036	3-month LIBOR + 1.95
Trust CS 2006-3 <sup>(4)</sup>	27,938	4.52 %	27,592	3.66 %	9/29/2006	10/30/2036	3-month EURIBOR + 2.05
Trust CS 2006-4	16,470	6.75 %	16,470	6.36 %	12/5/2006	1/30/2037	3-month LIBOR + 1.95
Trust CS 2006-5	6,650	6.75 %	6,650	6.36 %	12/19/2006	1/30/2037	3-month LIBOR + 1.95
Trust CS 2007-2	39,177	6.75 %	39,177	6.36 %	6/13/2007	7/30/2037	3-month LIBOR + 1.95
Total subordinated debt	934,988	5.27 %	934,514	5.08 %			
Acquisition discount <sup>(5)</sup>	(66,173)		(67,427)				
Net subordinated debt	\$ 868,815		\$ 867,087				

(1) Rates do not include the effects of discounts and issuance costs.

(2) Net of unamortized issuance costs of \$4.7 million.

(3) Interest rate is fixed until May 1, 2026, when it changes to a floating rate and resets quarterly at a benchmark rate plus 252 basis points.

(4) Denomination is in Euros with a value of €25.8 million.

(5) Amount represents the fair value adjustment on trust preferred securities assumed in acquisitions.

(6) Interest rate will transition to term SOFR plus the relevant spread adjustment as the applicable benchmark upon the cessation of LIBOR on June 30, 2023.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 10. DERIVATIVES**

The following table presents the U.S. dollar notional amounts and fair values of our derivative instruments included in the condensed consolidated balance sheets as of the dates indicated:

	March 31, 2023		December 31, 2022	
	Notional Amount	Fair Value	Notional Amount	Fair Value
<b>Derivatives Not Designated As Hedging Instruments</b>				
<i>(In thousands)</i>				
<b>Derivative Assets:</b>				
Interest rate contracts	\$ 107,894	\$ 5,174	\$ 108,451	\$ 6,013
Foreign exchange contracts	37,029	1,851	37,029	1,801
Interest rate and economic contracts	144,923	7,025	145,480	7,814
Equity warrant assets	18,120	3,978	18,209	4,048
Total	\$ 163,043	\$ 11,003	\$ 163,689	\$ 11,862
<b>Derivative Liabilities:</b>				
Interest rate contracts	\$ 107,894	\$ 5,026	\$ 108,451	\$ 5,825
Foreign exchange contracts	37,029	152	37,029	81
Total	\$ 144,923	\$ 5,178	\$ 145,480	\$ 5,906

For further information regarding our derivatives, see Note 1. *Nature of Operations and Summary of Significant Accounting Policies* of the Notes to Consolidated Financial Statements contained in "Item 8. Financial Statements and Supplementary Data" of the Form 10-K.

**NOTE 11. COMMITMENTS AND CONTINGENCIES**

The following table presents a summary of commitments described below as of the dates indicated:

	March 31, 2023	December 31, 2022
<i>(In thousands)</i>		
Loan commitments to extend credit	\$ 9,776,789	\$ 11,110,264
Standby letters of credit	321,651	320,886
Total	\$ 10,098,440	\$ 11,431,150

The Company is a party to financial instruments with off-balance sheet risk in the normal course of business to meet the financing needs of its customers. These financial instruments include commitments to extend credit and standby letters of credit. Those instruments involve, to varying degrees, elements of credit risk in excess of the amount recognized in the condensed consolidated balance sheets. The contract or notional amounts of those instruments reflect the extent of involvement that the Company has in particular classes of financial instruments.

Commitments to extend credit are contractual agreements to lend to our customers when customers are in compliance with their contractual credit agreements and when customers have contractual availability to borrow under such agreements. Commitments generally have fixed expiration dates or other termination clauses and may require payment of a fee. Since many of the commitments are expected to expire without being drawn upon, the total commitment amounts do not necessarily represent future cash requirements. The estimated exposure to loss from these commitments is included in the reserve for unfunded loan commitments, which amounted to \$75.6 million at March 31, 2023 and \$91.1 million at December 31, 2022.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Standby letters of credit are conditional commitments issued by the Company to guarantee the performance of a customer to a third party. We provide standby letters of credit in conjunction with several of our lending arrangements and property lease obligations. Most guarantees expire within one year from the date of issuance. If a borrower defaults on its commitments subject to any letter of credit issued under these arrangements, we would be required to meet the borrower's financial obligation but would seek repayment of that financial obligation from the borrower. In some cases, borrowers have pledged cash and investment securities as collateral under these arrangements.

In addition, we invest in SBICs that call for capital contributions up to an amount specified in the partnership agreements, and in CRA-related loan pools. As of March 31, 2023 and December 31, 2022, we had commitments to contribute capital to these entities totaling \$75.4 million and \$76.9 million.

The following table presents the years in which commitments are expected to be paid for our commitments to contribute capital to SBICs and CRA-related loan pools as of the date indicated:

		<u>March 31, 2023</u>
		<i>(In thousands)</i>
Period ending December 31,		
2023	\$	42,043
2024		33,383
Total	\$	<u>75,426</u>

***Legal Matters***

In the ordinary course of our business, the Company is party to various legal actions, which we believe are incidental to the operation of our business. The outcome of such legal actions and the timing of ultimate resolution are inherently difficult to predict. In the opinion of management, based upon currently available information, any resulting liability, in addition to amounts already accrued, and taking into consideration insurance which may be applicable, would not have a material adverse effect on the Company's financial statements or operations. The range of any reasonably possible liabilities is also not significant.

**NOTE 12. FAIR VALUE OPTION**

The Company may elect to report financial instruments and certain other items at fair value on an instrument-by-instrument basis with changes in fair value reported in earnings. The election is made upon the initial recognition of an eligible financial asset, financial liability, or firm commitment or when certain specified reconsideration events occur. The fair value election may not otherwise be revoked once an election is made. The changes in fair value are recorded in "Noninterest income" on the condensed consolidated statements of earnings. However, movements in debt valuation adjustments are reported as a component of "Accumulated other comprehensive (loss) income" on the condensed consolidated balance sheets. Debt valuation adjustments represent the portion of the total change in the fair value of a liability resulting from a change in the instrument-specific credit risk.

***Fair Value Option for Certain Debt Liabilities***

The Company has elected the fair value option for the credit-linked notes issued in September 2022. The Company elected the fair value option because these exposures are considered to be structured notes, which are financial instruments that contain embedded derivatives. The notes are linked to the credit risk of an approximately \$2.59 billion reference pool of previously purchased single-family residential mortgage loans. The principal balance of the credit-linked notes was \$129.5 million at March 31, 2023. The carrying value of the credit-linked notes at March 31, 2023 was the estimated fair value of \$128.4 million. The changes in fair value are reported in "Noninterest income" on the condensed consolidated statements of earnings.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following table presents the changes in fair value of the credit-linked notes for which the fair value option has been elected for the periods indicated:

<u>Credit-Linked Notes</u>	Three Months Ended	
	March 31,	
	2023	2022
	<i>(In thousands)</i>	
Changes in fair value - gains (losses)	\$ 1,998	\$ —

The following table provides information about the credit-linked notes carried at fair value as of the dates indicated:

<u>Credit-Linked Notes</u>	March 31,	December 31,
	2023	2022
	<i>(In thousands)</i>	
Carrying value reported on the consolidated balance sheets	\$ 128,375	\$ 132,030
Aggregate unpaid principal balance in excess of (less than) fair value	1,087	(911)

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 13. FAIR VALUE MEASUREMENTS**

The Company uses fair value to measure certain assets and liabilities on a recurring basis, primarily securities available-for-sale, derivatives, and certain debt liabilities. For assets measured at the lower of cost or fair value, the fair value measurement criteria may or may not be met during a reporting period and such measurements are therefore considered “nonrecurring” for purposes of disclosing our fair value measurements. Fair value is used on a nonrecurring basis to adjust carrying values for individually evaluated loans and leases and other real estate owned and also to record impairment on certain assets, such as goodwill, CDI, and other long-lived assets.

For information regarding the valuation methodologies used to measure our assets recorded at fair value (under ASC Topic 820), and for estimating fair value for financial instruments not recorded at fair value (under ASC Topic 825, as amended by ASU 2016-01 and ASU 2018-03), see Note 1. *Nature of Operations and Summary of Significant Accounting Policies*, and Note 15. *Fair Value Measurements*, to the Consolidated Financial Statements of the Company's Form 10-K.

The Company also holds SBIC investments measured at fair value using the NAV per share practical expedient that are not required to be classified in the fair value hierarchy. At March 31, 2023, the fair value of these investments was \$65.3 million.

The following tables present information on the assets and liabilities measured and recorded at fair value on a recurring basis as of the dates indicated:

<u>Measured on a Recurring Basis</u>	<b>Fair Value Measurements as of</b>			
	<b>March 31, 2023</b>			
	<b>Total</b>	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b>
	<i>(In thousands)</i>			
<b>Securities available-for-sale:</b>				
Agency residential MBS	\$ 2,249,080	\$ —	\$ 2,249,080	\$ —
U.S. Treasury securities	685,436	685,436	—	—
Agency commercial MBS	491,681	—	491,681	—
Agency residential CMOs	455,682	—	455,682	—
Municipal securities	345,639	—	345,639	—
Corporate debt securities	289,794	—	275,015	14,779
Private label residential CMOs	164,403	—	164,403	—
Collateralized loan obligations	102,994	—	102,994	—
Private label commercial MBS	25,535	—	25,535	—
Asset-backed securities	22,457	—	22,457	—
SBA securities	15,906	—	15,906	—
Total securities available-for-sale	<u>\$ 4,848,607</u>	<u>\$ 685,436</u>	<u>\$ 4,148,392</u>	<u>\$ 14,779</u>
Equity investments with readily determinable fair values	\$ 1	\$ 1	\$ —	\$ —
<b>Derivatives <sup>(1)</sup>:</b>				
Equity warrants	3,978	—	—	3,978
Interest rate and economic contracts	7,025	—	7,025	—
Derivative liabilities	5,178	—	5,178	—
Credit-linked notes	128,375	—	—	128,375

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Measured on a Recurring Basis	Fair Value Measurements as of			
	December 31, 2022			
	Total	Level 1	Level 2	Level 3
	(In thousands)			
Securities available-for-sale:				
Agency residential MBS	\$ 2,242,042	\$ —	\$ 2,242,042	\$ —
U.S. Treasury securities	670,070	670,070	—	—
Agency commercial MBS	487,606	—	487,606	—
Agency residential CMOs	457,063	—	457,063	—
Municipal securities	339,326	—	339,326	—
Corporate debt securities	311,905	—	311,905	—
Private label residential CMOs	166,724	—	166,724	—
Collateralized loan obligations	102,261	—	102,261	—
Private label commercial MBS	26,827	—	26,827	—
Asset-backed securities	22,413	—	22,413	—
SBA securities	17,250	—	17,250	—
Total securities available-for-sale	\$ 4,843,487	\$ 670,070	\$ 4,173,417	\$ —
Equity investments with readily determinable fair values	\$ 1	\$ 1	\$ —	\$ —
Derivatives <sup>(1)</sup> :				
Equity warrants	4,048	—	—	4,048
Interest rate and economic contracts	7,814	—	7,814	—
Derivative liabilities	5,906	—	5,906	—
Credit-linked notes	132,030	—	—	132,030

(1) For information regarding derivative instruments, see Note 10. *Derivatives*.

During the three months ended March 31, 2023, there was a \$1,000 transfer from Level 3 equity warrants to Level 1 equity investments with readily determinable fair values measured on a recurring basis. There was also an \$18.0 million transfer of corporate debt securities from Level 2 to Level 3 during the three months ended March 31, 2023.

The following table presents information about quantitative inputs and assumptions used to determine the fair values provided by our third party pricing service for our Level 3 corporate debt securities available-for-sale measured at fair value on a recurring basis as of the date indicated:

	March 31, 2023	
	Input or Range of Inputs	Weighted Average Input <sup>(1)</sup>
<b>Unobservable Inputs</b>		
Spread to 10 Year Treasury	4.2% - 7.7%	5.9%
Discount rates	7.7% - 11.2%	9.4%

(1) Unobservable inputs for corporate debt securities were weighted by the relative fair values of the instruments.



**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following table presents information about quantitative inputs and assumptions used in the modified Black-Scholes option pricing model to determine the fair value for our Level 3 equity warrants measured at fair value on a recurring basis as of the date indicated:

	March 31, 2023	
	Equity Warrants	
<u>Unobservable Inputs</u>	Range of Inputs	Weighted Average Input <sup>(1)</sup>
Volatility	22.7% - 104.0%	27.9%
Risk-free interest rate	3.6% - 4.9%	3.9%
Remaining life assumption (in years)	0.08 - 5.00	3.27

(1) Unobservable inputs for equity warrants were weighted by the relative fair values of the instruments.

The following table summarizes activity for our Level 3 private label commercial MBS available-for-sale, and equity warrants and credit-linked notes measured at fair value on a recurring basis for the period indicated:

	Corporate Debt Securities	Equity Warrants	Credit-Linked Notes
	<i>(In thousands)</i>		
Balance, December 31, 2022	\$ —	\$ 4,048	\$ 132,030
Total included in earnings	—	(333)	(1,998)
Total included in other comprehensive income (loss)	(3,221)	—	—
Issuances	—	283	—
Principal payments	—	—	(1,657)
Transfer from Level 2	18,000	—	—
Exercises and settlements	—	(19)	—
Transfers to Level 1 (equity investments with readily determinable fair values)	—	(1)	—
Balance, March 31, 2023	<u>\$ 14,779</u>	<u>\$ 3,978</u>	<u>\$ 128,375</u>
Unrealized net gains (losses) for the period included in other comprehensive income for securities held at quarter-end	<u>\$ (3,221)</u>		

The following tables present assets measured at fair value on a non-recurring basis as of the dates indicated:

<u>Measured on a Non-Recurring Basis</u>	Fair Value Measurement as of			
	March 31, 2023			
	Total	Level 1	Level 2	Level 3
	<i>(In thousands)</i>			
Individually evaluated loans and leases	\$ 23,673	\$ —	\$ 23,152	\$ 521
Total non-recurring	<u>\$ 23,673</u>	<u>\$ —</u>	<u>\$ 23,152</u>	<u>\$ 521</u>

<u>Measured on a Non-Recurring Basis</u>	Fair Value Measurement as of			
	December 31, 2022			
	Total	Level 1	Level 2	Level 3
	<i>(In thousands)</i>			
Individually evaluated loans and leases	\$ 34,077	\$ —	\$ 28,065	\$ 6,012
OREO	47	—	47	—
Total non-recurring	<u>\$ 34,124</u>	<u>\$ —</u>	<u>\$ 28,112</u>	<u>\$ 6,012</u>

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

The following table presents losses recognized on assets measured on a nonrecurring basis for the periods indicated:

Losses on Assets Measured on a Non-Recurring Basis	Three Months Ended March 31,	
	2023	2022
	<i>(In thousands)</i>	
Individually evaluated loans and leases	\$ 4,911	\$ 434
Total losses	\$ 4,911	\$ 434

The following table presents the valuation methodology and unobservable inputs for Level 3 assets measured at fair value on a nonrecurring basis as of the date indicated:

Asset	March 31, 2023				Weighted Average
	Fair Value	Valuation Technique	Unobservable Inputs	Input or Range	
	<i>(Dollars in thousands)</i>				
Individually evaluated loans and leases	521	Third party appraisals	No discounts		
Total non-recurring Level 3	\$ 521				

The following tables present carrying amounts and estimated fair values of certain financial instruments as of the dates indicated:

	March 31, 2023				
	Carrying Amount	Estimated Fair Value			
		Total	Level 1	Level 2	Level 3
<i>(In thousands)</i>					
<b>Financial Assets:</b>					
Cash and due from banks	\$ 218,830	\$ 218,830	\$ 218,830	\$ —	\$ —
Interest-earning deposits in financial institutions	6,461,306	6,461,306	6,461,306	—	—
Securities available-for-sale	4,848,607	4,848,607	685,436	4,148,392	14,779
Securities held-to-maturity	2,273,650	2,157,056	176,629	1,945,900	34,527
Investment in FHLB stock	147,150	147,150	—	147,150	—
Loans held for sale	2,796,208	2,807,699	—	2,807,699	—
Loans and leases held for investment, net	25,462,326	24,138,162	—	23,152	24,115,010
Equity investments with readily determinable fair values	1	1	1	—	—
Equity warrants	3,978	3,978	—	—	3,978
Interest rate and economic contracts	7,025	7,025	—	7,025	—
Servicing rights	1,409	1,409	—	—	1,409
<b>Financial Liabilities:</b>					
Retail non-maturity deposits	19,230,293	19,230,293	—	19,230,293	—
Wholesale non-maturity deposits	2,028,676	2,028,676	—	2,028,676	—
Time deposits	6,928,592	6,945,479	—	6,945,479	—
Borrowings	11,881,712	11,899,375	4,910,000	5,450,000	1,539,375
Subordinated debt	868,815	823,002	—	823,002	—
Derivative liabilities	5,178	5,178	—	5,178	—

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

	December 31, 2022				
	Carrying Amount	Estimated Fair Value			
		Total	Level 1	Level 2	Level 3
	<i>(In thousands)</i>				
<b>Financial Assets:</b>					
Cash and due from banks	\$ 212,273	\$ 212,273	\$ 212,273	\$ —	\$ —
Interest-earning deposits in financial institutions	2,027,949	2,027,949	2,027,949	—	—
Securities available-for-sale	4,843,487	4,843,487	670,070	4,173,417	—
Securities held-to-maturity	2,269,135	2,110,472	171,700	1,938,772	—
Investment in FHLB stock	34,290	34,290	—	34,290	—
Loans held for sale	65,076	65,501	—	65,501	—
Loans and leases held for investment, net	28,408,397	26,627,985	—	28,065	26,599,920
Equity investments with readily determinable fair values	1	1	1	—	—
Equity warrants	4,048	4,048	—	—	4,048
Interest rate and economic contracts	7,814	7,814	—	7,814	—
Servicing rights	633	633	—	—	633
<b>Financial Liabilities:</b>					
Retail non-maturity deposits	26,561,129	26,561,129	—	26,561,129	—
Wholesale non-maturity deposits	2,637,362	2,637,362	—	2,637,362	—
Time deposits	4,737,843	4,700,054	—	4,700,054	—
Borrowings	1,764,030	1,764,037	882,000	750,007	132,030
Subordinated debt	867,087	870,534	—	870,534	—
Derivative liabilities	5,906	5,906	—	5,906	—

**Limitations**

Fair value estimates are made at a specific point in time and are based on relevant market information and information about the financial instrument. These estimates do not reflect income taxes or any premium or discount that could result from offering for sale at one time the Company's entire holdings of a particular financial instrument. Because no market exists for a portion of the Company's financial instruments, fair value estimates are based on what management believes to be reasonable judgments regarding expected future cash flows, current economic conditions, risk characteristics of various financial instruments, and other factors. These estimated fair values are subjective in nature and involve uncertainties and matters of significant judgment and therefore cannot be determined with precision. Changes in assumptions could significantly affect the estimates. Since the fair values have been estimated as of March 31, 2023, the amounts that will actually be realized or paid at settlement or maturity of the instruments could be significantly different.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 14. EARNINGS PER COMMON SHARE**

The following table presents the computations of basic and diluted net earnings per common share for the periods indicated:

	Three Months Ended	
	March 31,	
	2023	2022
	<i>(Dollars in thousands, except per share data)</i>	
<b>Basic Earnings Per Common Share:</b>		
Net (loss) earnings	\$ (1,195,424)	\$ 120,128
Less: Preferred stock dividends	(9,947)	—
Net (loss) earnings available to common stockholders	(1,205,371)	120,128
Less: Earnings allocated to unvested restricted stock <sup>(1)</sup>	(319)	(2,037)
Net (loss) earnings allocated to common shares	\$ (1,205,690)	\$ 118,091
Weighted-average basic shares and unvested restricted stock outstanding	120,239	119,595
Less: Weighted-average unvested restricted stock outstanding	(2,309)	(2,246)
Weighted-average basic shares outstanding	117,930	117,349
Basic (loss) earnings per common share	\$ (10.22)	\$ 1.01
<b>Diluted Earnings Per Common Share:</b>		
Net (loss) earnings allocated to common shares	\$ (1,205,690)	\$ 118,091
Weighted-average diluted shares outstanding	117,930	117,349
Diluted (loss) earnings per common share	\$ (10.22)	\$ 1.01

(1) Represents cash dividends paid to holders of unvested restricted stock, net of forfeitures, plus undistributed earnings amounts available to holders of unvested restricted stock, if any.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 15. REVENUE FROM CONTRACTS WITH CUSTOMERS*****Disaggregation of Revenue***

The following table presents interest income and noninterest income, the components of total revenue, as disclosed in the condensed consolidated statements of earnings and the related amounts which are from contracts with customers within the scope of ASC Topic 606, "Revenue from Contracts with Customers," for the periods indicated. As illustrated here, substantially all of our revenue is specifically excluded from the scope of ASC Topic 606.

	Three Months Ended March 31,			
	2023		2022	
	Total Recorded Revenue	Revenue from Contracts with Customers	Total Recorded Revenue	Revenue from Contracts with Customers
	<i>(In thousands)</i>			
<b>Total Interest Income</b>	\$ 517,788	\$ —	\$ 322,904	\$ —
<b>Noninterest Income:</b>				
Service charges on deposit accounts	3,573	3,573	3,571	3,571
Other commissions and fees	10,344	4,432	11,580	3,773
Leased equipment income	13,857	—	13,094	—
Gain on sale of loans	2,962	—	60	—
(Loss) gain on sale of securities	—	—	104	—
Dividends and (losses) gains on equity securities	1,098	—	(11,375)	—
Warrant income	(333)	—	629	—
Other income	4,890	269	3,155	(2)
Total noninterest income	36,391	8,274	20,818	7,342
<b>Total Revenue</b>	<b>\$ 554,179</b>	<b>\$ 8,274</b>	<b>\$ 343,722</b>	<b>\$ 7,342</b>

The following table presents revenue from contracts with customers based on the timing of revenue recognition for the periods indicated:

	Three Months Ended March 31,	
	2023	2022
	<i>(In thousands)</i>	
Products and services transferred at a point in time	\$ 4,352	\$ 3,926
Products and services transferred over time	3,922	3,416
Total revenue from contracts with customers	<b>\$ 8,274</b>	<b>\$ 7,342</b>

***Contract Balances***

The following table provides information about receivables, contract assets, and contract liabilities from contracts with customers as of the dates indicated:

	March 31, 2023		December 31, 2022	
	<i>(In thousands)</i>			
	\$	1,278	\$	1,403
Receivables, which are included in "Other assets"	\$	1,278	\$	1,403
Contract liabilities, which are included in "Accrued interest payable and other liabilities"	\$	470	\$	488

Contract liabilities relate to advance consideration received from customers for which revenue is recognized over the life of the contract. The change in contract liabilities for the three months ended March 31, 2023 due to revenue recognized that was included in the contract liability balance at the beginning of the period was \$18,000.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 16. STOCKHOLDERS' EQUITY*****Stock-Based Compensation***

At the annual meeting of stockholders held on May 11, 2021, the Company's stockholders approved the Amended and Restated PacWest Bancorp 2017 Stock Incentive Plan (the "Amended and Restated 2017 Plan"). The Company's Amended and Restated 2017 Plan permits stock-based compensation awards to officers, directors, employees, and consultants and will remain in effect until December 31, 2026. The Amended and Restated 2017 Plan authorizes grants of stock-based compensation instruments to issue up to 6,650,000 shares. As of March 31, 2023, there were 1,951,831 shares available for grant under the Amended and Restated 2017 Plan.

***Restricted Stock***

Restricted stock amortization totaled \$5.0 million and \$7.6 million for the three months ended March 31, 2023 and 2022. Such amounts are included in "Compensation expense" on the condensed consolidated statements of earnings. The amount of unrecognized compensation expense related to unvested TRSAs and PRSUs as of March 31, 2023 totaled \$67.4 million.

***Time-Based Restricted Stock Awards***

At March 31, 2023, there were 2,207,618 shares of unvested TRSAs outstanding. TRSAs generally vest ratably over a service period of three or four years from the date of the grant or immediately upon death of an employee. Compensation expense related to TRSAs is based on the fair value of the underlying award on the grant date and is recognized over the vesting period using the straight-line method.

***Performance-Based Restricted Stock Units***

At March 31, 2023, there were 656,049 units of unvested PRSUs that have been granted. The PRSUs will vest only if performance goals with respect to certain financial metrics are met over a three-year performance period. The shares underlying the PRSUs are not considered issued and outstanding until they vest. PRSUs are granted and initially expensed based on a target number. The number of shares that will ultimately vest based on actual performance will range from zero to a maximum of either 150% or 200% of target.

Compensation expense related to PRSUs is based on the fair value of the underlying award on the grant date and is amortized over the vesting period using the straight-line method unless it is determined that: (1) attainment of the financial metrics is less than probable, in which case a portion or all of the amortization is suspended, or (2) attainment of the financial metrics is improbable, in which case a portion or all of the previously recognized amortization is reversed and also suspended. If it is determined that attainment of a financial measure higher than target is probable, the amortization will increase to up to 150% or 200% of the target amortization amount. Annual PRSU expense may vary during the three-year performance period based upon changes in management's estimate of the number of shares that may ultimately vest. In the case where the performance target for the PRSU is based on a market condition (such as total shareholder return), the amortization is neither reversed nor suspended if it is subsequently determined that the attainment of the performance target is less than probable or improbable and the employee continues to meet the service requirement of the award.

***Preferred Stock***

At March 31, 2023, our preferred stock of \$498.5 million represents 20,530,000 depositary shares (the "Depositary Shares"), each representing a 1/40th ownership interest in a share of the Company's 7.75% fixed rate reset non-cumulative, non-convertible, perpetual preferred stock, Series A, par value \$0.01 per share (the "Series A preferred stock"), with a liquidation preference of \$1,000 per share of Series A preferred stock (equivalent to \$25.00 per Depositary Share). The Series A preferred stock qualifies as Tier 1 capital for purposes of regulatory capital calculations. The Series A preferred stock is perpetual and has no maturity date.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

Dividends on the Series A preferred stock are not cumulative or mandatory. If the Company's Board of Directors does not declare a dividend on the Series A preferred stock in respect of a dividend period, then no dividend shall be deemed to be payable for such dividend period or be cumulative, and the Company will have no obligation to pay any dividend for that dividend period, whether or not the Board of Directors declares a dividend on the Series A preferred stock or any other class or series of its capital stock for any future dividend period. Additionally, so long as any share of Series A preferred stock remains outstanding, unless dividends on all outstanding shares of Series A preferred stock for the most recently completed dividend period have been paid in full or declared and a sum sufficient for the payment thereof has been set aside for payment, no dividend shall be declared or paid or set aside for payment and no distribution shall be declared or made or set aside for payment on the Company's common stock.

**NOTE 17. RECENTLY ISSUED ACCOUNTING STANDARDS**

Standard	Description	Effective Date	Effect on the Financial Statements or Other Significant Matters
ASU 2022-03, <i>Fair Value Measurement (Topic 820): Fair Value Measurement of Equity Securities Subject to Contractual Sale Restrictions</i>	This standard clarifies that a contractual sale restriction is not considered in measuring an equity security at fair value. The standard also clarifies that an entity cannot recognize a contractual sale restriction as a separate unit of account, such as a contra-asset or liability. The standard requires new disclosures for all entities with equity securities subject to contractual sales restrictions. Additionally, early adoption is permitted.	January 1, 2024	The Company does not take into account contractual sale restrictions in determining the fair value of its equity securities. The Company expects that this standard will not have a material impact on its consolidated financial statements.

Standard	Description	Effective Date	Effect on the Financial Statements or Other Significant Matters
ASU 2023-02, <i>Investments - Equity Method and Joint Ventures (Topic 323): Accounting for Investments in Tax Credit Structures Using the Proportional Amortization Method</i> (a consensus of the Emerging Issues Task Force)	This standard expands the proportional amortization method to account for investments in all tax credit structures. That accounting method was previously allowed only for low-income housing tax credit ("LIHTC") investments, but now is available, by election, to all community development tax credit investment reporting that meets five conditions. Under the new guidance, reporting entities can make accounting policy elections on a tax-credit-program-by-tax-credit-program basis, rather than for individual investments or at the reporting entity level. Additionally, early adoption is permitted.	January 1, 2024	The Company is evaluating the impact of this standard on its consolidated financial statements.

**PACWEST BANCORP AND SUBSIDIARIES**  
**Notes to Condensed Consolidated Financial Statements (Unaudited)**

**NOTE 18. SUBSEQUENT EVENTS**

***Common Stock Dividends***

On May 5, 2023, the Company announced that the Board of Directors had declared a quarterly cash dividend of \$0.01 per common share. The cash dividend is payable on May 31, 2023 to stockholders of record at the close of business on May 15, 2023.

***Preferred Stock Dividends***

On May 5, 2023, the Company announced that the Board of Directors had declared a quarterly cash dividend of \$0.4845 per Depository Share. The cash dividend is payable on June 1, 2023 to stockholders of record at the close of business on May 15, 2023.

***Loans Transferred to Held For Sale and Loan Sales***

Through May 5, 2023, we transferred \$384 million of loans to held for sale and recognized charge-offs of \$12.2 million to record these loans at the lower of cost or their estimated market value. We completed sales of \$431 million of loans through May 5, 2023, and recorded net gains on these sales of \$0.1 million.

***Loans Pledged as Collateral***

On May 10, 2023, the Company pledged an additional \$5.1 billion of loans to the FRB which resulted in additional borrowing capacity of \$3.9 billion under our existing discount window borrowing facility, and results in immediately-available liquidity (on-balance sheet liquidity and unused borrowing capacity) of \$15.0 billion. Borrowings under the discount window program can range in length from overnight to up to 90 days.

The Company has evaluated events that have occurred subsequent to March 31, 2023 and have concluded there are no other subsequent events that would require recognition in the accompanying condensed consolidated financial statements.



**ITEM 2. MANAGEMENT'S DISCUSSION AND ANALYSIS OF FINANCIAL CONDITION AND RESULTS OF OPERATIONS****Forward-Looking Information**

This Form 10-Q contains certain “forward-looking statements” about the Company and its subsidiaries within the meaning of the Private Securities Litigation Reform Act of 1995, including certain plans, strategies, goals, and projections and including statements about our expectations regarding our operating expenses, profitability, allowance for loan and lease losses, net interest margin, net interest income, deposit growth, loan and lease portfolio growth and production, acquisitions, maintaining capital adequacy, liquidity, goodwill, and interest rate risk management. All statements contained in this Form 10-Q that are not clearly historical in nature are forward-looking, and the words “anticipate,” “assume,” “intend,” “believe,” “forecast,” “expect,” “estimate,” “plan,” “continue,” “will,” “should,” “look forward” and similar expressions are generally intended to identify forward-looking statements. All forward-looking statements (including statements regarding future financial and operating results and future transactions and their results) involve risks, uncertainties and contingencies, many of which are beyond our control, which may cause actual results, performance, or achievements to differ materially from anticipated results, performance or achievements. Actual results could differ materially from those contained or implied by such forward-looking statements for a variety of factors, including without limitation:

- weaker than expected general business and economic conditions, including a recession, could adversely affect the Company’s revenues, the values of its assets and liabilities, negatively impact loan and deposit growth, and may impact our borrowers ability to repay their loans;
- the impact of bank failures or other adverse developments at other banks on general investor sentiment regarding the stability and liquidity of banks, the safety of deposits, and depositor behavior;
- compression of the net interest margin due to changes in the interest rate environment, forward yield curves, loan products offered, spreads on newly originated loans and leases, changes in our asset or liability mix, and/or changes to the cost of deposits and borrowings;
- our ability to compete effectively against other financial service providers in our markets;
- continued deterioration in general business and economic conditions, uncertainty in U.S. fiscal monetary policy, including the interest rate policies of the Federal Reserve Board, and volatility and disruption in credit and capital markets could adversely affect the Company's revenues and the value of its assets and liabilities, lead to a tightening of credit, and increase stock price volatility;
- changes in credit quality and the effect of credit quality and the current expected credit loss accounting standard on our provision for credit losses and allowance for credit losses;
- our ability to attract deposits and other sources of funding or liquidity, particularly in a rising or high interest rate environment, and the quality and composition of our deposits;
- our ability to efficiently manage our liquidity;
- the need to increase capital for strategic or regulatory reasons;
- impact of the benchmark interest rate reform in the U.S. including the transition away from the U.S. dollar London Inter-bank Offering Rate ("LIBOR") to alternative reference rates;
- reduced demand for our services due to strategic or regulatory reasons or reduced demand for our products due to legislative changes such as new rent control laws;
- our ability to successfully execute on initiatives relating to enhancements of our technology infrastructure, including client-facing systems and applications;
- legislative or regulatory requirements or changes, including an increase of capital requirements, and increased political and regulatory uncertainty;
- the impact on our reputation and business from our interactions with business partners, counterparties, service providers and other third parties;
- the impact of climate change, public health issues, natural or man-made disasters such as wildfires, droughts and earthquakes, all of which are particularly common in California;
- higher than anticipated increases in operating expenses;

- lower than expected dividends paid from the Bank to the holding company;
- the effectiveness of our risk management framework and quantitative models;
- the costs and effects of legal, compliance, and regulatory actions, changes and developments, including the impact of adverse judgments or settlements in litigation, the initiation and resolution of regulatory or other governmental inquiries or investigations, and/or the results of regulatory examinations or reviews;
- the impact of changes made to tax laws or regulations affecting our business, including the disallowance of tax benefits by tax authorities and/or changes in tax filing jurisdictions or entity classifications; and
- our success at managing risks involved in the foregoing items and all other risk factors described in our audited consolidated financial statements, and other risk factors described in this Form 10-Q and other documents filed or furnished by PacWest with the SEC.

All forward-looking statements included in this Form 10-Q are based on information available at the time the statement is made. We are under no obligation to (and expressly disclaim any such obligation to) update or alter our forward-looking statements, whether as a result of new information, future events or otherwise except as required by law.

## Overview

PacWest Bancorp, a Delaware corporation, is a bank holding company registered under the BHCA and headquartered in Los Angeles, California, with an executive office in Denver, Colorado. Our principal business is to serve as the holding company for our wholly-owned subsidiary, Pacific Western Bank. References to "Pacific Western" or the "Bank" refer to Pacific Western Bank together with its wholly-owned subsidiaries. References to "we," "us," or the "Company" refer to PacWest Bancorp together with its subsidiaries on a consolidated basis. When we refer to "PacWest" or to the "holding company," we are referring to PacWest Bancorp, the parent company, on a stand-alone basis.

The Bank is a relationship-based community bank focused on providing business banking and treasury management services to small, middle-market, and venture-backed businesses. The Bank offers a broad range of loan and lease and deposit products and services through full-service branches throughout California and in Durham, North Carolina and Denver, Colorado, and loan production offices around the country.

In managing the top line of our business, we focus on loan growth, loan yield, deposit cost, and net interest margin. Net interest income, on a year-to-date basis in 2023, accounted for 88.5% of net revenue (net interest income plus noninterest income).

At March 31, 2023, the Company had total assets of \$44.3 billion, including \$28.5 billion of total loans and leases, net of deferred fees, \$4.8 billion of securities available-for-sale, \$2.3 billion of securities held-to-maturity, and \$6.5 billion of interest-earning deposits in financial institutions compared to \$41.2 billion of total assets at December 31, 2022, including \$28.7 billion of total loans and leases, net of deferred fees, \$4.8 billion of securities available-for-sale, \$2.3 billion securities held-to-maturity, and \$2.0 billion of interest-earning deposits in financial institutions. The \$3.1 billion increase in total assets since year-end was due primarily to a \$4.4 billion increase in interest-earning deposits in financial institutions, offset mainly by a \$1.4 billion decrease in goodwill. See "- Recent Events" for discussion regarding the changes in total assets and total liabilities during the three months ended March 31, 2023.

At March 31, 2023, the Company had total liabilities of \$41.5 billion, including total deposits of \$28.2 billion and borrowings of \$11.9 billion, compared to \$37.3 billion of total liabilities at December 31, 2022, including \$33.9 billion of total deposits and \$1.8 billion borrowings. The \$4.3 billion increase in total liabilities since year-end was due mainly to an increase of \$10.1 billion in borrowings, partially offset by a \$5.7 billion decrease in deposits.

At March 31, 2023, the Company had total stockholders' equity of \$2.8 billion compared to \$4.0 billion at December 31, 2022. The \$1.2 billion decrease in stockholders' equity since year-end was due mainly to the net loss of \$1.2 billion. Our consolidated common equity Tier 1 (CET1), Tier 1 capital and Total capital ratios increased to 9.21%, 11.15%, and 14.21% at March 31, 2023 due primarily to positive adjusted earnings combined with a decrease in risk-weighted assets.

## Recent Events

### ***Impact of Two Bank Closures***

During the first quarter of 2023, the closure of two large regional banks resulted in market volatility and a significant decline in regional bank stock prices, including our stock price. Due to the presence of a triggering event that indicated it was more likely than not that our goodwill was impaired, we performed a goodwill impairment assessment and recorded an impairment of \$1.38 billion in the first quarter, as the estimated fair value of equity was less than book value as of March 31, 2023. This is a non-cash charge and had no impact on our regulatory capital ratios, cash flows, or liquidity position. The goodwill impairment charge resulted in a net loss of \$1.21 billion in the first quarter.

The closure of the two banks, and the resulting customer fear of additional failures, resulted in an outflow of our deposits from accounts with greater than the FDIC's \$250,000 insurance coverage amount. Total deposits decreased by \$5.7 billion or 16.9% in the first quarter. Most of the decrease in deposits was from uninsured deposits, which resulted in the percentage of insured deposits to total deposits to increase from 48% at December 31, 2022 to 71% of total deposits at March 31, 2023. We responded to this banking crisis quickly by significantly increasing the amount of borrowings and wholesale/brokered deposits to enhance our liquidity position to prepare for any additional deposit outflows. This change in our funding mix in the month of March 2023 had a negative impact on our net interest margin which declined to 2.89% in the first quarter of 2023 compared to 3.41% in the fourth quarter of 2022. To improve our net interest margin we intend to complete strategic asset sales in the second quarter of 2023, which led to the transfer of our \$2.7 billion Lender Finance loan portfolio to held for sale as of March 31, 2023. The proceeds of these asset sales, combined with reducing on-balance sheet cash to a more normalized level, will allow us to reduce the amount of higher-cost borrowings and/or brokered deposits and reduce the cost of our interest-bearing liabilities. Upon completion of these actions, we expect that our total assets will be closer to \$35 billion.

In addition to the \$1.38 billion goodwill impairment, we also recorded \$8.5 million of reorganization costs comprised of severance and contract termination charges related to our operational efficiency initiative. These items are considered non-operating and non-recurring charges and, thus, in this document, you will see disclosures for adjusted earnings, adjusted earnings per share, adjusted return on average assets and adjusted return on average tangible common equity that exclude these items. This allows the reader to more readily compare results for the first quarter of 2023 with historical quarterly results. See the Non-GAAP Measurements section of this document for a reconciliation of these Non-GAAP adjusted measures to measures calculated in accordance with GAAP.

### ***Impact of First Republic Bank Closure and Sale***

On May 1, 2023, First Republic Bank was closed by regulators and immediately sold to J.P. Morgan Chase. This event heightened market and customer fears of additional bank failures, including PacWest. Our stock price declined approximately 41% from \$10.15 on April 28, 2023, to \$5.96 on May 5, 2023. On the afternoon of May 3, 2023, PacWest was featured prominently in the financial news headlines with reports that PacWest was "exploring all of its options and having talks with potential investors and partners". The news headlines increased our customers fears of the safety of their deposits. During the week ended May 5, 2023, our deposits declined approximately 9.5%, with a majority of that decline occurring on May 4th and May 5th after the news reports on the afternoon of May 3rd. PacWest funded this decline in deposits with available on-balance sheet liquidity. As of May 10, 2023, immediately-available liquidity (on-balance sheet liquidity and unused borrowing capacity) was \$15.0 billion, which exceeded uninsured deposits of \$5.2 billion, representing a coverage ratio of 288%.

These recent events, and the ongoing news coverage of these events, has increased certain risks and uncertainties related to our business and future prospects. See also the updated "*Risk Factors*" section disclosed in Part II, Item 1A of this quarterly report on Form 10-Q.

## Key Performance Indicators

Among other factors, our operating results generally depend on the following key performance indicators:

### *The Level of Net Interest Income*

Net interest income is the excess of interest earned on our interest-earning assets over the interest paid on our interest-bearing liabilities. Net interest margin is net interest income (annualized if related to a quarterly period) expressed as a percentage of average interest-earning assets. Tax equivalent net interest income is net interest income increased by an adjustment for tax-exempt interest on certain loans and investment securities based on a 21% federal statutory tax rate. Tax equivalent net interest margin is calculated as tax equivalent net interest income divided by average interest-earning assets.

Net interest income is affected by changes in both interest rates and the volume of average interest-earning assets and interest-bearing liabilities. Our primary interest-earning assets are loans and investment securities, and our primary interest-bearing liabilities are deposits and borrowings. Contributing to our strong net interest margin is our strong yield on loans and leases and concentration of lower cost retail non-maturity deposits. While our deposit balances will fluctuate depending on our customers' liquidity and cash flow, market conditions, and competitive pressures, we seek to minimize the impact of these variances by attracting a high percentage of noninterest-bearing deposits. During 2023 and 2022, our net interest margin was negatively impacted because we accessed the wholesale funding market to replace outflows of retail non-maturity deposits.

### *Loan and Lease Production*

We actively seek new lending opportunities under an array of lending products. Our lending activities include real estate mortgage loans, real estate construction and land loans, commercial loans and leases, and a small amount of consumer lending. Our commercial real estate loans and real estate construction loans are secured by a range of property types. Our commercial loans and leases portfolio is diverse and generally includes various asset-secured loans, equipment-secured loans and leases, venture capital loans to support venture capital firms' operations and the operations of entrepreneurial and venture-backed companies during the various phases of their early life cycles, and secured business loans. In January 2023, we announced that we were slowing loan growth to preserve capital and strengthen our balance sheet, including winding down our premium finance and multi-family lending groups in the fourth quarter of 2022.

Our loan origination process emphasizes credit quality. On occasion, to augment our internal loan production, we have purchased loans such as multi-family loans from other banks, private student loans from third-party lenders, and, most recently, single-family residential mortgage loans. Prior to our acquisition of Civic, we also purchased loans from Civic. These loan purchases help us manage the concentrations in our portfolio as they diversify the geographic, interest-rate risk, credit risk, and product composition of our loan portfolio. Achieving net loan growth is subject to many factors, including maintaining strict credit standards, competition from other lenders, and borrowers that opt to prepay loans.

### *The Magnitude of Credit Losses*

We emphasize credit quality in originating and monitoring our loans and leases, and we measure our success by the levels of our classified loans and leases, nonaccrual loans and leases, and net charge-offs. We maintain an allowance for credit losses on loans and leases, which is the sum of the allowance for loan and lease losses and the reserve for unfunded loan commitments. Provisions for credit losses are charged to operations as and when needed for both on and off-balance sheet credit exposures. Loans and leases that are deemed uncollectable are charged off and deducted from the allowance for loan and lease losses. Recoveries on loans and leases previously charged off are added to the allowance for loan and lease losses. The provision for credit losses on the loan and lease portfolio is based on our allowance methodology, which considers the impact of assumptions and is reflective of historical experience, economic forecasts viewed to be reasonable and supportable by management, the current loan and lease composition, and relative credit risks known as of the balance sheet date. For originated and acquired credit-deteriorated loans, a provision for credit losses may be recorded to reflect credit deterioration after the origination date or after the acquisition date, respectively.

We regularly review loans and leases to determine whether there has been any deterioration in credit quality resulting from borrower operations or changes in collateral value or other factors which may affect collectability of our loans and leases. Changes in economic conditions, such as the rate of economic growth, the unemployment rate, rate of inflation, increases in the general level of interest rates, declines in real estate values, changes in commodity prices, and adverse conditions in borrowers' businesses, could negatively impact our borrowers and cause us to adversely classify loans and leases. An increase in classified loans and leases generally results in increased provisions for credit losses and an increased allowance for credit losses. Any deterioration in the commercial real estate market may lead to increased provisions for credit losses because our loans are concentrated in commercial real estate loans.

**The Level of Noninterest Expense**

Our noninterest expense includes fixed and controllable overhead, the largest components of which are compensation and occupancy expense. It also includes costs that tend to vary based on the volume of activity, such as loan and lease production and the number and complexity of foreclosed assets. We measure success in controlling both fixed and variable costs through monitoring of the efficiency ratio, which is calculated by dividing noninterest expense (less intangible asset amortization, net foreclosed assets expense (income), goodwill impairment, and acquisition, integration and reorganization costs) by net revenues (the sum of tax equivalent net interest income plus noninterest income, less gain (loss) on sale of securities and gain (loss) on sales of assets other than loans and leases).

The following table presents the calculation of our efficiency ratio for the periods indicated:

<b>Efficiency Ratio</b>	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<i>(Dollars in thousands)</i>	
Noninterest expense	\$ 1,573,003	\$ 167,426
Less: Intangible asset amortization	2,411	3,649
Foreclosed assets (income) expense, net	363	(3,353)
Goodwill impairment	1,376,736	—
Acquisition, integration and reorganization costs	8,514	—
Noninterest expense used for efficiency ratio	<u>\$ 184,979</u>	<u>\$ 167,130</u>
Net interest income (tax equivalent)	\$ 281,625	\$ 312,651
Noninterest income	<u>36,391</u>	<u>20,818</u>
Net revenues	318,016	333,469
Less: Gain (loss) on sale of securities	—	104
Net revenues used for efficiency ratio	<u>\$ 318,016</u>	<u>\$ 333,365</u>
Efficiency ratio	58.2 %	50.1 %

**Critical Accounting Policies and Estimates**

Our accounting policies are fundamental to understanding management's discussion and analysis of results of operations and financial condition. We identify critical policies and estimates as those that require management to make particularly difficult, subjective, and/or complex judgments about matters that are inherently uncertain and because of the likelihood that materially different amounts would be reported under different conditions or using different assumptions. These policies and estimates relate to the allowance for credit losses on loans and leases held for investment, the carrying value of goodwill and other intangible assets, and the realization of deferred income tax assets and liabilities.

Our critical accounting policies and estimates are described in Item 7. *Management's Discussion and Analysis of Financial Condition and Results of Operations* included in our Form 10-K.

**Non-GAAP Measurements**

We use certain non-GAAP financial measures to provide meaningful supplemental information regarding the Company’s operational performance and to enhance investors’ overall understanding of such financial performance. The methodology for determining these non-GAAP measures may differ among companies. We used the following non-GAAP measures in this Form 10-Q:

- **Return on average tangible common equity, tangible common equity ratio, and tangible book value per common share:** Given that the use of these measures is prevalent among banking regulators, investors, and analysts, we disclose them in addition to the related GAAP measures of return on average equity, equity to assets ratio, and book value per common share, respectively. The reconciliations of these non-GAAP measurements to the GAAP measurements are presented in the following tables for and as of the periods presented.

	Three Months Ended March 31,	
	2023	2022
	<i>(Dollars in thousands)</i>	
<b>Return on Average Tangible Common Equity</b>		
Net (loss) earnings	\$ (1,195,424)	\$ 120,128
(Loss) earnings before income taxes	\$ (1,260,340)	\$ 162,109
Add: Goodwill impairment	1,376,736	—
Add: Intangible asset amortization	2,411	3,649
Adjusted earnings before income taxes	118,807	165,758
Adjusted income tax expense <sup>(1)</sup>	33,741	42,931
Adjusted net earnings	85,066	122,827
Less: Preferred stock dividends	9,947	—
Adjusted net earnings available to common stockholders	\$ 75,119	\$ 122,827
Average stockholders' equity	\$ 3,998,687	\$ 3,847,481
Less: Average intangible assets	1,391,857	1,449,056
Less: Average preferred stock	498,516	—
Average tangible common equity	\$ 2,108,314	\$ 2,398,425
Return on average equity <sup>(2)</sup>	(121.24)%	12.66 %
Return on average tangible common equity <sup>(3)</sup>	14.45 %	20.77 %

(1) Adjusted effective tax rate of 28.4% and 25.9% used for the three months ended March 31, 2023 and 2022, respectively.

(2) Annualized net (loss) earnings divided by average stockholders' equity.

(3) Annualized adjusted net earnings available to common stockholders divided by average tangible common equity.

<b>Adjusted Return on Average Tangible Common Equity</b>	<b>Three Months Ended</b>	
	<b>March 31, 2023</b>	<b>March 31, 2022</b>
	<i>(Dollars in thousands)</i>	
(Loss) earnings before income taxes	\$ (1,260,340)	\$ 162,109
Add: Goodwill impairment	1,376,736	—
Add: Intangible asset amortization	2,411	3,649
Add: Acquisition, integration, and reorganization costs	8,514	—
Adjusted earnings before income taxes	<u>127,321</u>	<u>165,758</u>
Adjusted income tax expense <sup>(1)</sup>	36,159	42,931
Adjusted net earnings	<u>91,162</u>	<u>122,827</u>
Less: Preferred stock dividends	9,947	—
Adjusted net earnings available to common stockholders	<u>\$ 81,215</u>	<u>\$ 122,827</u>
Average stockholders' equity	\$ 3,998,687	\$ 3,847,481
Less: Average intangible assets	1,391,857	1,449,056
Less: Average preferred stock	498,516	—
Average tangible common equity	<u>\$ 2,108,314</u>	<u>\$ 2,398,425</u>
Adjusted return on average tangible common equity <sup>(2)</sup>	15.62 %	20.77 %

(1) Adjusted effective tax rate of 28.4% used for the three months ended March 31, 2023; effective tax rate of 25.9% used for three months ended March 31, 2022.

(2) Annualized adjusted net earnings available to common stockholders divided by average tangible common equity.

<b>Tangible Common Equity Ratio and Tangible Book Value Per Common Share</b>	<b>March 31, 2023</b>	<b>December 31, 2022</b>
	<i>(Dollars in thousands, except per share data)</i>	
Stockholders' equity	\$ 2,771,477	\$ 3,950,531
Less: Preferred stock	498,516	498,516
<b>Total common equity</b>	<b>2,272,961</b>	<b>3,452,015</b>
Less: Intangible assets	28,970	1,408,117
<b>Tangible common equity</b>	<b>2,243,991</b>	<b>2,043,898</b>
Add: Accumulated other comprehensive loss (income)	736,060	790,903
<b>Adjusted tangible common equity</b>	<b>\$ 2,980,051</b>	<b>\$ 2,834,801</b>
<b>Total assets</b>	<b>\$ 44,302,981</b>	<b>\$ 41,228,936</b>
Less: Intangible assets	28,970	1,408,117
<b>Tangible assets</b>	<b>\$ 44,274,011</b>	<b>\$ 39,820,819</b>
Equity to assets ratio	6.26 %	9.58 %
Tangible common equity ratio <sup>(1)</sup>	5.07 %	5.13 %
Tangible common equity ratio, excluding AOCI <sup>(2)</sup>	6.73 %	7.12 %
Book value per common share <sup>(3)</sup>	\$ 18.90	\$ 28.71
Tangible book value per common share <sup>(4)</sup>	\$ 18.66	\$ 17.00
Tangible book value per common share, excluding AOCI <sup>(5)</sup>	\$ 24.78	\$ 23.58
Common shares outstanding	120,244,214	120,222,057

- (1) Tangible common equity divided by tangible assets.
- (2) Adjusted tangible common equity divided by tangible assets.
- (3) Total common equity divided by common shares outstanding.
- (4) Tangible common equity divided by common shares outstanding.
- (5) Adjusted tangible common equity divided by common shares outstanding.



Adjusted Earnings, Earnings Per Share, and Return on Average Assets	Three Months Ended	
	March 31, 2023	March 31, 2022
	<i>(Dollars in thousands)</i>	
(Loss) earnings before income taxes	\$ (1,260,340)	\$ 162,109
Add: Goodwill impairment	1,376,736	—
Add: Acquisition, integration, and reorganization costs	8,514	—
Adjusted earnings before income taxes	124,910	162,109
Adjusted income tax expense <sup>(1)</sup>	35,474	41,981
Adjusted earnings	89,436	120,128
Less: Preferred stock dividends	(9,947)	—
Adjusted earnings available to common stockholders	79,489	120,128
Less: Earnings allocated to unvested restricted stock	(1,210)	(2,037)
Adjusted earnings allocated to common shares	\$ 78,279	\$ 118,091
Weighted average shares outstanding	\$ 117,930	\$ 117,349
Adjusted diluted earnings per common share <sup>(2)</sup>	\$ 0.66	\$ 1.01
Average assets	\$ 42,768,714	\$ 39,883,304
Adjusted return on average assets <sup>(3)</sup>	0.85 %	1.22 %

(1) Adjusted effective tax rate of 28.4% used for the three months ended March 31, 2023; effective tax rate of 25.9% used for three months ended March 31, 2022.

(2) Adjusted earnings allocated to common shares divided by weighted average shares outstanding.

(3) Annualized adjusted earnings divided by average assets.

**Results of Operations**

**Earnings Performance**

The following table presents performance metrics for the periods indicated:

	Three Months Ended March 31,	
	2023	2022
<i>(Dollars in thousands, except per share data)</i>		
<b>Earnings Summary:</b>		
Interest income	\$ 517,788	\$ 322,904
Interest expense	(238,516)	(14,187)
Net interest income	279,272	308,717
Provision for credit losses	(3,000)	—
Noninterest income	36,391	20,818
Operating expense	(187,753)	(167,426)
Acquisition, integration and reorganization costs	(8,514)	—
Goodwill impairment	(1,376,736)	—
(Loss) earnings before income taxes	(1,260,340)	162,109
Income tax benefit (expense)	64,916	(41,981)
Net (loss) earnings	(1,195,424)	120,128
Preferred stock dividends	(9,947)	—
Net (loss) earnings available to common stockholders	\$ (1,205,371)	\$ 120,128
<b>Per Common Share Data:</b>		
Diluted (loss) earnings per common share	\$ (10.22)	\$ 1.01
Book value per common share	\$ 18.90	\$ 30.52
Tangible book value per common share <sup>(1)</sup>	\$ 18.66	\$ 18.42
<b>Performance Ratios:</b>		
Return on average assets	(11.34)%	1.22 %
Return on average tangible common equity <sup>(1)</sup>	14.45 %	20.77 %
Net interest margin (tax equivalent)	2.89 %	3.43 %
Yield on average loans and leases (tax equivalent)	6.14 %	4.66 %
Cost of average total deposits	1.98 %	0.07 %
Efficiency ratio	58.2 %	50.1 %
<b>Capital Ratios (consolidated):</b>		
Common equity tier 1 capital ratio	9.21 %	8.64 %
Tier 1 capital ratio	11.15 %	9.07 %
Total capital ratio	14.21 %	12.27 %
Tier 1 leverage capital ratio	8.33 %	7.11 %
Risk-weighted assets	\$ 32,507,454	\$ 30,297,312

(1) See "- Non-GAAP Measurements."

*First Quarter of 2023 Compared to First Quarter of 2022*

Net (loss) earnings available to common stockholders for the first quarter of 2023 was a loss of \$1.205 billion, or a loss of \$10.22 per diluted share, compared to net earnings available to common stockholders for the first quarter of 2022 of \$120.1 million, or \$1.01 per diluted share. The \$1.325 billion decrease in net earnings available to common stockholders from the first quarter of 2022 was due mainly to a goodwill impairment recorded in the first quarter of 2023 of \$1.377 billion. Excluding the goodwill impairment and \$8.5 million of reorganization costs, adjusted earnings available to common stockholders in the first quarter of 2023 was \$79.5 million, a decrease of \$40.6 million from the \$120.1 million in the first quarter of 2022. This \$40.6 million decrease was comprised primarily of a \$29.4 million decrease in net interest income, a \$20.3 million increase in noninterest expense, and a \$9.9 million increase in preferred stock dividends, partially offset by a \$15.6 million increase in noninterest income and a \$6.5 million decrease in adjusted income tax expense. The decrease in net interest income was due primarily to our interest-bearing liabilities repricing faster than our interest-bearing assets when interest rates rapidly increased over the last year. Also, the mix of our interest-bearing liabilities changed significantly in the first quarter of 2023 as the closure of two banks caused an outflow of lower-cost customer deposits, which were replaced with higher-cost borrowings and wholesale/brokered deposits. The increase in noninterest expense was due primarily to an \$11.4 million increase in customer related expense (higher account analysis expense due to higher earnings credit rate), a \$6.2 million increase in insurance and assessments expense (higher FDIC assessment due to higher assessment rate and higher assessment base), and a \$3.7 million increase in foreclosed assets expense (first quarter of 2022 included a large gain on sale). The increase in preferred stock dividends is due to our preferred stock being issued in the second quarter of 2022 and there being no dividends in the first quarter of 2022. The increase in noninterest income is primarily due to an increase in dividends and gains on equity investments of \$12.5 million as the first quarter of 2022 had losses of \$11.4 million due to volatility in the equity market resulting from geopolitical tensions and inflationary pressures. The decrease in income tax expense is due to a decrease in adjusted earnings before taxes in the first quarter of 2023, partially offset by a higher effective tax rate as compared to the first quarter of 2022.

**Net Interest Income**

The following tables summarize the distribution of average assets, liabilities, and stockholders' equity, as well as interest income and yields earned on average interest-earning assets and interest expense and rates paid on average interest-bearing liabilities, presented on a tax equivalent basis, for the periods indicated:

	Three Months Ended					
	March 31, 2023			March 31, 2022		
	Average Balance	Interest Income/Expense	Yields and Rates	Average Balance	Interest Income/Expense	Yields and Rates
<i>(Dollars in thousands)</i>						
<b>ASSETS:</b>						
Loans and leases <sup>(1)(2)(3)(4)</sup>	\$ 28,583,265	\$ 433,029	6.14 %	\$ 23,433,019	\$ 269,521	4.66 %
Investment securities <sup>(2)(4)</sup>	7,191,362	44,246	2.50 %	10,397,709	55,594	2.17 %
Deposits in financial institutions	3,682,228	42,866	4.72 %	3,083,159	1,723	0.23 %
Total interest-earning assets <sup>(2)</sup>	39,456,855	520,141	5.35 %	36,913,887	326,838	3.59 %
Other assets	3,311,859			2,969,417		
Total assets	<u>\$ 42,768,714</u>			<u>\$ 39,883,304</u>		
<b>LIABILITIES AND STOCKHOLDERS' EQUITY:</b>						
Interest checking	\$ 7,089,102	55,957	3.20 %	\$ 7,094,623	1,776	0.10 %
Money market	8,932,059	56,224	2.55 %	10,852,454	3,461	0.13 %
Savings	597,287	599	0.41 %	642,709	39	0.02 %
Time	5,123,955	43,112	3.41 %	1,278,609	932	0.30 %
Total interest-bearing deposits	21,742,403	155,892	2.91 %	19,868,395	6,208	0.13 %
Borrowings	5,289,429	69,122	5.30 %	298,444	161	0.22 %
Subordinated debt	867,637	13,502	6.31 %	863,572	7,818	3.67 %
Total interest-bearing liabilities	27,899,469	238,516	3.47 %	21,030,411	14,187	0.27 %
Noninterest-bearing demand deposits	10,233,434			14,463,667		
Other liabilities	637,124			541,745		
Total liabilities	38,770,027			36,035,823		
Stockholders' equity	3,998,687			3,847,481		
Total liabilities and stockholders' equity	<u>\$ 42,768,714</u>			<u>\$ 39,883,304</u>		
Net interest income <sup>(2)</sup>		<u>\$ 281,625</u>			<u>\$ 312,651</u>	
Net interest rate spread <sup>(2)</sup>			1.88 %			3.32 %
Net interest margin <sup>(2)</sup>			2.89 %			3.43 %
Total deposits <sup>(5)</sup>	\$ 31,975,837	\$ 155,892	1.98 %	\$ 34,332,062	\$ 6,208	0.07 %

(1) Includes nonaccrual loans and leases and loan fees. Includes tax-equivalent adjustments related to tax-exempt interest on loans.

(2) Tax equivalent.

(3) Includes net loan premium amortization of \$2.8 million and \$5.7 million for the three months ended March 31, 2023 and 2022, respectively.

(4) Includes tax-equivalent adjustments of \$2.3 million and \$1.8 million for the three months ended March 31, 2023 and 2022, respectively, related to tax-exempt income on loans.

Includes tax-equivalent adjustments of \$9 thousand and \$2.2 million for the three months ended March 31, 2023 and 2022, respectively, related to tax-exempt interest on investment securities. The federal statutory rate utilized was 21%.

(5) Total deposits is the sum of interest-bearing deposits and noninterest-bearing demand deposits. The cost of total deposits is calculated as annualized interest expense on total deposits divided by average total deposits.

*First Quarter of 2023 Compared to First Quarter of 2022*

Net interest income decreased by \$29.4 million to \$279.3 million for the first quarter of 2023 compared to \$308.7 million for the first quarter of 2022 due mainly to higher interest expense on deposits and borrowings partially offset by higher interest income on loans and leases and deposits in financial institutions. The increase in interest expense was due to a higher cost and balance of average interest-bearing liabilities. The increase in interest income on loans and leases was attributable to a higher average balance and higher yield on average loans and leases. The tax equivalent yield on average loans and leases was 6.14% for the first quarter of 2023, compared to 4.66% for the same quarter of 2022. The increase in interest income on deposits in financial institutions was due mainly to a higher rate paid on deposits at the Federal Reserve.

The tax equivalent NIM was 2.89% for the first quarter of 2023 compared to 3.43% for the comparable quarter last year. The decrease in the tax equivalent NIM was due mostly to a shift in our funding mix in the second half of March 2023 as we responded to the banking crisis to enhance liquidity and protect franchise value. Average borrowings as a percentage of average interest-bearing liabilities was 19% for the first quarter of 2023 compared to 1% for the first quarter of 2022. The additional borrowings are largely short-term in nature, which will allow us to normalize our funding mix over time as economic conditions stabilize. The tax-equivalent NIM was further impacted by a higher cost of total deposits and borrowings, offset partially by higher yields on loans and leases and deposits in financial institutions.

The cost of average total deposits was 1.98% for the first quarter of 2023 compared to 0.07% for the first quarter of 2022 due mainly to higher average balances and rates and a change in the mix of average deposits, resulting from a decrease in lower cost retail non-maturity deposits and an increase in higher cost retail and brokered time deposits.

**Provision for Credit Losses**

The following table sets forth the details of the provision for credit losses on loans and leases held for investment and held-to-maturity securities and information regarding credit quality metrics for the periods indicated:

	Three Months Ended	
	March 31,	
	2023	2022
	<i>(Dollars in thousands)</i>	
<b>Provision For Credit Losses:</b>		
Addition to (reduction in) allowance for loan and lease losses	\$ 18,500	\$ (2,000)
Addition to (reduction in) reserve for unfunded loan commitments	(15,500)	2,000
Total loan-related provision	\$ 3,000	\$ —
Addition to allowance for held-to-maturity securities	—	—
Total provision for credit losses	\$ 3,000	\$ —
<b>Credit Quality Metrics:</b>		
Net charge-offs (recoveries) on loans and leases held for investment <sup>(1)</sup>	\$ 9,177	\$ 1,166
Annualized net charge-offs (recoveries) to average loans and leases	0.13 %	0.02 %
At quarter-end:		
Allowance for credit losses	\$ 285,626	\$ 272,469
Allowance for credit losses to loans and leases held for investment	1.11 %	1.12 %
Allowance for credit losses to nonaccrual loans and leases held for investment	327.8 %	409.5 %
Nonaccrual loans and leases held for investment	\$ 87,124	\$ 66,538
Nonaccrual loans and leases held for investment to loans and leases held for investment	0.34 %	0.27 %

(1) See "Balance Sheet Analysis - Allowance for Credit Losses on Loans and Leases Held for Investment" for detail of charge-offs and recoveries by loan portfolio segment, class, and subclass for the periods presented.

Provisions for credit losses are charged to earnings for the allowance for loan and lease losses, the reserve for unfunded loan commitments, and the allowance for credit losses on held-to-maturity securities. The provision for credit losses on our loans and leases held for investment is based on our allowance methodology and is an expense that, in our judgment, is required to maintain an adequate allowance for credit losses. For further details on our loan-related allowance for credit losses methodology, see “- Balance Sheet Analysis - Allowance for Credit Losses on Loans and Leases Held for Investment” contained herein.

#### *First Quarter of 2023 Compared to First Quarter of 2022*

The provision for credit losses increased by \$3.0 million to a provision of \$3.0 million for the first quarter of 2023 compared to no provision for the first quarter of 2022. During the first quarter of 2023, while loans and leases held for investment and unfunded loan commitments declined, a \$3.0 million provision was recognized due to an increase in qualitative reserves for loans secured by commercial real estate and higher net charge-offs. During the first quarter of 2022, no provision was recorded as a result of improvements in both macro-economic forecast variables and loan portfolio credit quality metrics, offset by increased provisions for unfunded loan commitments and loan growth.

Certain circumstances may lead to increased provisions for credit losses on loans and leases in the future. Examples of such circumstances include deterioration in economic conditions and forecasts, an increased amount of classified and/or criticized loans and leases, and net loan and lease and unfunded commitment growth. Deterioration in economic conditions and forecasts include the rate of economic growth, the unemployment rate, the rate of inflation, changes in the general level of interest rates, changes in real estate values, and adverse conditions in borrowers’ businesses. See further discussion in “- Balance Sheet Analysis - Allowance for Credit Losses on Loans and Leases Held for Investment” contained herein.

#### **Noninterest Income**

The following table summarizes noninterest income by category for the periods indicated:

<b>Noninterest Income</b>	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<i>(In thousands)</i>	
Leased equipment income	\$ 13,857	\$ 13,094
Other commissions and fees	10,344	11,580
Service charges on deposit accounts	3,573	3,571
Gain on sale of loans and leases	2,962	60
Gain (loss) on sale of securities	—	104
Dividends and gains (losses) on equity investments	1,098	(11,375)
Warrant income	(333)	629
Other	4,890	3,155
<b>Total noninterest income</b>	<b>\$ 36,391</b>	<b>\$ 20,818</b>

#### *First Quarter of 2023 Compared to First Quarter of 2022*

Noninterest income increased by \$15.6 million to \$36.4 million for the first quarter of 2023 compared to \$20.8 million for the first quarter of 2022 due mainly to an increase of \$12.5 million in dividends and gains (losses) on equity investments, a \$2.9 million increase in gain on sale of loans and lease and a \$1.7 million increase in other income. Dividends and gains (losses) on equity investments increased mostly due to losses of \$11.4 million recorded in the first quarter of 2022 primarily due to volatility in equity markets resulting from geopolitical tensions and inflationary pressures. Gain on sale of loans and leases increased in the first quarter of 2023 due principally to higher levels of loan sale activity compared to the same period in 2022. The increase in other income was due primarily to a \$2.0 million gain from the change in fair value of the credit-linked notes in the first quarter of 2023.

**Noninterest Expense**

The following table summarizes noninterest expense by category for the periods indicated:

Noninterest Expense	Three Months Ended	
	March 31,	
	2023	2022
	<i>(In thousands)</i>	
Compensation	\$ 88,476	\$ 92,240
Customer related expense	24,005	12,655
Occupancy	15,067	15,200
Insurance and assessments	11,717	5,490
Data processing	10,938	9,629
Leased equipment depreciation	9,375	9,189
Loan expense	6,524	5,157
Other professional services	6,073	5,954
Intangible asset amortization	2,411	3,649
Foreclosed assets expense (income), net	363	(3,353)
Other	12,804	11,616
Total operating expense	187,753	167,426
Acquisition, integration and reorganization costs	8,514	—
Goodwill impairment	1,376,736	—
Total noninterest expense	\$ 1,573,003	\$ 167,426

**First Quarter of 2023 Compared to First Quarter of 2022**

Noninterest expense increased by \$1.406 billion to \$1.573 billion for the first quarter of 2023 compared to \$167.4 million for the first quarter of 2022 due mainly to a \$1.377 billion goodwill impairment charge incurred in the first quarter of 2023. Excluding the goodwill impairment charge and acquisition, integration and reorganization costs, operating expenses increased by \$20.3 million in the first quarter of 2023 as compared to the first quarter of 2022. This increase was due mainly to increases of \$11.4 million in customer related expense and \$6.2 million in insurance and assessments expense. The increase in customer related expense was due primarily to higher customer analysis expenses and reciprocal deposit fees. The increase in insurance and assessments expense was due to higher FDIC assessment expense attributable to the 2 basis point assessment rate increase effective January 1, 2023, and a higher assessment base as a result of the \$1.6 billion increase in average assets in the first quarter of 2023.

**Income Taxes**

The effective tax rate for the first quarter of 2023 was 5.2% compared to 25.9% for the first quarter of 2022. Excluding goodwill impairment of \$1.4 billion, the effective income tax rate for the first quarter of 2023 was 28.4%. The increase from the first quarter of 2022 was due primarily to higher disallowed interest expense in the first quarter of 2023. The Company's blended statutory tax rate for federal and state is 27.5%. Excluding goodwill impairment, the Company's effective tax rate for the full year 2023 is currently estimated to be in the range of 28% to 30%.

**Balance Sheet Analysis**
**Securities Available-for-Sale**

The following table presents the composition and durations of our securities available-for-sale as of the dates indicated:

Security Type	March 31, 2023			December 31, 2022		
	Fair Value	% of Total	Duration (in years)	Fair Value	% of Total	Duration (in years)
<i>(Dollars in thousands)</i>						
Agency residential MBS	\$ 2,249,080	46 %	7.5	\$ 2,242,042	46 %	7.6
U.S. Treasury securities	685,436	14 %	4.7	670,070	14 %	4.9
Agency commercial MBS	491,681	10 %	4.5	487,606	10 %	4.7
Agency residential CMOs	455,682	10 %	4.4	457,063	9 %	4.4
Municipal securities	345,639	7 %	5.5	339,326	7 %	5.6
Corporate debt securities	289,794	6 %	2.0	311,905	7 %	2.7
Private label residential CMOs	164,403	4 %	5.9	166,724	4 %	5.6
Collateralized loan obligations	102,994	2 %	—	102,261	2 %	—
Private label commercial MBS	25,535	1 %	2.2	26,827	1 %	2.3
Asset-backed securities	22,457	— %	—	22,413	— %	—
SBA securities	15,906	— %	2.6	17,250	— %	2.5
Total securities available-for-sale	<u>\$ 4,848,607</u>	<u>100 %</u>	5.7	<u>\$ 4,843,487</u>	<u>100 %</u>	5.9

Effective June 1, 2022, the Company transferred \$2.3 billion in fair value of municipal securities, agency commercial MBS, private label commercial MBS, U.S. Treasury securities, and corporate debt securities from available-for-sale to held-to-maturity. The unrealized losses on the transferred securities are being amortized over the expected remaining life of the securities in a manner consistent with the amortization of a premium or discount.

The following table shows the geographic composition of the majority of our available-for-sale municipal securities portfolio as of the date indicated:

Municipal Securities by State	March 31, 2023	
	Fair Value	% of Total
<i>(Dollars in thousands)</i>		
Texas	\$ 121,365	35 %
California	61,094	18 %
Oregon	33,745	10 %
Washington	24,393	7 %
Minnesota	20,947	6 %
Delaware	19,460	6 %
Florida	18,384	5 %
Wisconsin	12,491	3 %
Rhode Island	10,705	3 %
Iowa	6,861	2 %
Total of ten largest states	<u>329,445</u>	<u>95 %</u>
All other states	<u>16,194</u>	<u>5 %</u>
Total municipal securities available-for-sale	<u>\$ 345,639</u>	<u>100 %</u>



**Securities Held-to-Maturity**

The following table presents the composition and durations of our securities held-to-maturity as of the date indicated:

Security Type	March 31, 2023			December 31, 2022		
	Amortized	% of	Duration	Amortized	% of	Duration
	Cost	Total	(in years)	Cost	Total	(in years)
	<i>(Dollars in thousands)</i>			<i>(Dollars in thousands)</i>		
Municipal securities	\$ 1,244,441	55 %	8.8	\$ 1,243,443	55 %	9.0
Agency commercial MBS	428,995	19 %	7.4	427,411	19 %	7.5
Private label commercial MBS	346,976	15 %	6.9	345,825	15 %	7.1
U.S. Treasury securities	184,862	8 %	7.4	184,162	8 %	7.5
Corporate debt securities	69,876	3 %	5.1	69,794	3 %	5.8
Total securities held-to-maturity	\$ 2,275,150	100 %	8.0	\$ 2,270,635	100 %	8.2

The following table shows the geographic composition of the majority of our held-to-maturity municipal securities portfolio as of the date indicated:

Municipal Securities by State	March 31, 2023	
	Amortized	% of
	Cost	Total
	<i>(Dollars in thousands)</i>	
California	\$ 308,496	25 %
Texas	275,563	22 %
Washington	190,088	15 %
Oregon	78,170	6 %
Maryland	64,883	5 %
Georgia	55,389	4 %
Colorado	49,159	4 %
Minnesota	35,191	3 %
Tennessee	30,861	3 %
Florida	21,975	2 %
Total of ten largest states	1,109,775	89 %
All other states	134,666	11 %
Total municipal securities held-to-maturity	\$ 1,244,441	100 %

**Loans and Leases Held for Investment**

The following table presents the composition of our loans and leases held for investment, net of deferred fees, by loan portfolio segment, class, and subclass as of the dates indicated:

Loan and Lease Portfolio	March 31, 2023		December 31, 2022	
	Balance	% of Total	Balance	% of Total
<i>(Dollars in thousands)</i>				
<b>Real Estate Mortgage:</b>				
Commercial real estate	\$ 2,493,081	10 %	\$ 2,537,629	9 %
SBA program	628,241	2 %	621,187	2 %
Hotel	687,429	3 %	688,015	2 %
Total commercial real estate mortgage	3,808,751	15 %	3,846,831	13 %
Multi-family	5,523,320	21 %	5,607,865	20 %
Residential mortgage	2,862,952	11 %	2,902,088	10 %
Investor-owned residential	2,822,714	11 %	2,886,828	10 %
Residential renovation	389,874	2 %	486,712	2 %
Total other residential real estate	6,075,540	24 %	6,275,628	22 %
Total real estate mortgage	15,407,611	60 %	15,730,324	55 %
<b>Real Estate Construction and Land:</b>				
Commercial	910,327	4 %	898,592	3 %
Residential	3,698,113	14 %	3,253,580	11 %
Total real estate construction and land <sup>(1)</sup>	4,608,440	18 %	4,152,172	14 %
Total real estate	20,016,051	78 %	19,882,496	69 %
<b>Commercial:</b>				
Lender finance	157,340	1 %	3,172,814	11 %
Equipment finance	824,531	3 %	908,141	3 %
Premium finance	906,277	3 %	861,006	3 %
Other asset-based	180,179	1 %	198,248	1 %
Total asset-based	2,068,327	8 %	5,140,209	18 %
Equity fund loans	1,203,137	5 %	1,356,428	5 %
Venture lending	855,100	3 %	676,874	2 %
Total venture capital	2,058,237	8 %	2,033,302	7 %
Secured business loans	366,725	1 %	347,660	1 %
Paycheck Protection Program	7,718	— %	10,192	— %
Other lending	728,100	3 %	750,599	3 %
Total other commercial	1,102,543	4 %	1,108,451	4 %
Total commercial	5,229,107	20 %	8,281,962	29 %
<b>Consumer</b>				
Total loans and leases held for investment, net of deferred fees	\$ 25,672,381	100 %	\$ 28,609,129	100 %
Total unfunded loan commitments	\$ 9,776,789		\$ 11,110,264	

(1) Includes land and acquisition and development loans of \$142.9 million at March 31, 2023 and \$153.5 million at December 31, 2022.

The following table presents the geographic composition of our real estate loans held for investment, net of deferred fees, by the top 10 states and all other states combined (in the order presented for the current quarter-end) as of the dates indicated:

<b>Real Estate Loans by State</b>	<b>March 31, 2023</b>		<b>December 31, 2022</b>	
	<b>Balance</b>	<b>% of Total</b>	<b>Balance</b>	<b>% of Total</b>
	<i>(Dollars in thousands)</i>			
California	\$ 10,753,125	54 %	\$ 10,832,550	55 %
Florida	1,384,543	7 %	1,360,163	7 %
Colorado	1,109,555	5 %	1,029,284	5 %
Texas	930,654	5 %	933,280	5 %
New York	730,984	4 %	666,238	3 %
Washington	683,671	3 %	689,873	3 %
Arizona	561,130	3 %	572,951	3 %
Nevada	483,487	2 %	511,485	3 %
Oregon	436,890	2 %	442,353	2 %
Georgia	356,552	2 %	361,577	2 %
Total of 10 largest states	17,430,591	87 %	17,399,754	88 %
All other states	2,585,460	13 %	2,482,742	12 %
Total real estate loans held for investment, net of deferred fees	\$ 20,016,051	100 %	\$ 19,882,496	100 %

The following table presents a roll forward of loans and leases held for investment, net of deferred fees, for the periods indicated:

<b>Roll Forward of Loans and Leases Held for Investment, Net of Deferred Fees <sup>(1)</sup></b>	<b>Three Months Ended March 31, 2023</b>
	<i>(In thousands)</i>
Balance, beginning of period	\$ 28,609,129
Additions:	
Production	468,671
Disbursements	1,622,898
Total production and disbursements	2,091,569
Reductions:	
Payoffs	(1,021,652)
Paydowns	(965,537)
Total payoffs and paydowns	(1,987,189)
Sales	(231,798)
Transfers to foreclosed assets	(2,568)
Charge-offs	(10,397)
Transfers to loans held for sale	(2,796,365)
Total reductions	(5,028,317)
Net increase	(2,936,748)
Balance, end of period	\$ 25,672,381
Weighted average rate on production <sup>(2)</sup>	8.44 %

(1) Includes direct financing leases but excludes equipment leased to others under operating leases.

(2) The weighted average rate on production presents contractual rates on a tax equivalent basis and does not include amortized fees. Amortized fees added approximately 17 basis points to loan yields for the three months ended March 31, 2023.

### ***Allowance for Credit Losses on Loans and Leases Held for Investment***

The allowance for credit losses on loans and leases held for investment is the combination of the allowance for loan and lease losses and the reserve for unfunded loan commitments. The allowance for loan and lease losses is reported as a reduction of the amortized cost basis of loans and leases, while the reserve for unfunded loan commitments is included within "Accrued interest payable and other liabilities" on the consolidated balance sheets. The amortized cost basis of loans and leases does not include accrued interest receivable, which is included in "Other assets" on the consolidated balance sheets. The "Provision for credit losses" on the consolidated statement of earnings (loss) is a combination of the provision for loan and lease losses, the provision for unfunded loan commitments, and the provision for held-to-maturity debt securities.

Under the CECL methodology, expected credit losses reflect losses over the remaining contractual life of an asset, considering the effect of prepayments and available information about the collectability of cash flows, including information about relevant historical experience, current conditions, and reasonable and supportable forecasts of future events and circumstances. Thus, the CECL methodology incorporates a broad range of information in developing credit loss estimates.

For further information regarding the calculation of the allowance for credit losses on loans and leases held for investment using the CECL methodology, see Note 1. *Nature of Operations and Summary of Significant Accounting Policies* of the Notes to Consolidated Financial Statements contained in "Item 8. Financial Statements and Supplementary Data" of our Form 10-K.

In calculating our allowance for credit losses, we continued to consider higher inflation rates, rising interest rates, the risk of a recession, technical or otherwise, and the Russia-Ukraine war as well as any trailing impact of the COVID-19 pandemic in our process for estimating expected credit losses given the changes in economic forecasts and assumptions along with the uncertainty related to the severity and duration of the economic consequences resulting from such events. Our methodology and framework along with the 4-quarter reasonable and supportable forecast period and 2-quarter reversion period have remained consistent since the implementation of CECL on January 1, 2020. Certain management assumptions are reassessed every quarter based on current expectations for credit losses, while other assumptions are assessed and updated on at least an annual basis.

For the first quarter of 2023, we used the Moody's March 2023 Baseline and S3 Downside 90th Percentile forecast scenarios for the calculation of our quantitative component. The weightings of the scenarios were consistent with the fourth quarter of 2022 and based on management's current expectations for the economic forecast, acknowledging the risk of a near-term recession and inherent uncertainty, with a smaller weighting assigned to the S3 Downside scenario. Compared to the fourth quarter of 2022, the economic forecasts were slightly more favorable with decreases in the loan and leases held for investment and unfunded commitments resulting in a decrease to the allowance for credit losses partially offset by increases in qualitative adjustments for loans secured by commercial real estate.

As part of our allowance for credit losses methodology, we consistently incorporate the use of qualitative factors in determining the overall allowance for credit losses to capture risks that may not be adequately reflected in our quantitative models. During the first quarter of 2021, we added qualitative components that were based on management's assessment of various qualitative factors such as economic conditions and collateral dependency. These qualitative components were primarily related to certain loan portfolios including hotels, retail, and office properties that were more directly affected by the COVID-19 pandemic and may react more slowly to the improvements in the general economic conditions. These sectors may see a slower economic recovery to pre-pandemic levels due to changes in consumer behavior such as less business travel due to more virtual meetings, more online shopping versus in person shopping, or the potential for more permanent shifts to remote or hybrid working arrangements. Additionally, small businesses in these sectors may face greater challenges once debt relief and PPP funding is exhausted. Throughout 2021 and 2022, these qualitative adjustments were updated based on evolving forecasts of property values and the pace of recovery for small businesses. During the first quarter of 2023, forecasted property values for office properties declined and, therefore, our qualitative adjustments were increased.

During the first quarter of 2023, while loans and leases held for investment and unfunded loan commitments declined, a \$3 million provision was recognized due to an increase in qualitative reserves for loans secured by commercial real estate and higher net charge-offs. The loan-related allowance for credit losses as a percentage of loans and leases held for investment increased due to transferring \$2.7 billion of Lender Finance loans with low historical loss rates to held for sale and increasing qualitative adjustments for loans secured by commercial real estate.

The use of different economic forecasts, whether based on different scenarios, the use of multiple or single scenarios, or updated economic forecasts and scenarios, can change the outcome of the calculations. In addition to the economic forecasts, there are numerous components and assumptions that are integral to the overall estimation of allowance for credit losses. As part of our allowance for credit losses process, sensitivity analyses are performed to assess the impact of how changing certain assumptions could impact the estimated allowance for credit losses. At times, these analyses can provide information to further assist management in making decisions on certain assumptions. We calculated alternative values for our March 31, 2023 ACL using various alternative forecast scenarios provided by Moody's including the Moody's S1 Upside 10th Percentile and S3 Downside 90th Percentile and the calculated amounts for the quantitative component differed from the probability-weighted multiple scenario forecast ranging from lower by 5.67% to higher by 22.45%. However, changing one assumption and not reassessing other assumptions used in the quantitative or qualitative process could yield results that are not reasonable or appropriate, hence all assumptions and information must be considered. From a sensitivity analysis perspective, changing key assumptions such as the macro-economic variable inputs from the economic forecasts, the reasonable and supportable forecast period, prepayment rates, loan segmentation, historical loss factors and/or periods, among others, would all change the outcome of the quantitative components of the allowance for credit losses. Those results would then need to be assessed from a qualitative perspective potentially requiring further adjustments to the qualitative component to arrive at a reasonable and appropriate allowance for credit losses.

The determination of the allowance for credit losses is complex and highly dependent on numerous models, assumptions, and judgments made by management. Management's current expectation for credit losses on loans and leases held for investment as quantified in the allowance for credit losses considers the impact of assumptions and is reflective of historical credit experience, economic forecasts viewed to be reasonable and supportable, current loan and lease composition, and relative credit risks known as of the balance sheet date.

Management believes the allowance for credit losses is appropriate for the current expected credit losses in our loan and lease portfolio and associated unfunded loan commitments, and the credit risk ratings and inherent loss rates currently assigned are reasonable and appropriate as of the reporting date. It is possible that others, given the same information, may at any point in time reach different conclusions that could result in a significant impact to the Company's financial statements.

The following table presents information regarding the allowance for credit losses on loans and leases held for investment as of the dates indicated:

<b><u>Allowance for Credit Losses Data</u></b>	<b>March 31, 2023</b>	<b>December 31, 2022</b>
	<i>(Dollars in thousands)</i>	
Allowance for loan and lease losses	\$ 210,055	\$ 200,732
Reserve for unfunded loan commitments	75,571	91,071
Total allowance for credit losses	<u>\$ 285,626</u>	<u>\$ 291,803</u>
Allowance for loan and lease losses to loans and leases held for investment	0.82 %	0.70 %
Allowance for credit losses to loans and leases held for investment	1.11 %	1.02 %

The following table presents the changes in our allowance for credit losses on loans and leases held for investment for the periods indicated:

<b>Allowance for Credit Losses Roll Forward</b>	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<i>(Dollars in thousands)</i>	
Balance, beginning of period	\$ 291,803	\$ 273,635
Provision for credit losses:		
Addition to (reduction in) allowance for loan and lease losses	18,500	(2,000)
(Reduction in) addition to reserve for unfunded loan commitments	(15,500)	2,000
Total provision for credit losses	<u>3,000</u>	<u>—</u>
Loans and leases charged off:		
Real estate mortgage	(9,835)	(168)
Real estate construction and land	—	—
Commercial	(137)	(2,833)
Consumer	(425)	(233)
Total loans and leases charged off	<u>(10,397)</u>	<u>(3,234)</u>
Recoveries on loans charged off:		
Real estate mortgage	200	163
Real estate construction and land	—	149
Commercial	975	1,735
Consumer	45	21
Total recoveries on loans charged off	<u>1,220</u>	<u>2,068</u>
Net charge-offs	<u>(9,177)</u>	<u>(1,166)</u>
Balance, end of period	<u>\$ 285,626</u>	<u>\$ 272,469</u>
Annualized net charge-offs to average loans and leases	0.13 %	0.02 %

The following table presents charge-offs by loan portfolio segment, class, and subclass for the periods indicated:

<u>Allowance for Credit Losses Charge-offs</u>	<b>Three Months Ended</b>	
	<b>March 31,</b>	
	<b>2023</b>	<b>2022</b>
	<i>(In thousands)</i>	
<b>Real Estate Mortgage:</b>		
Commercial real estate	\$ 6,926	\$ —
SBA program	—	113
Hotel	—	55
Total commercial real estate mortgage	<u>6,926</u>	<u>168</u>
Multi-family	—	—
Residential mortgage	—	—
Investor-owned residential	1,811	—
Residential renovation	1,098	—
Total other residential real estate	<u>2,909</u>	<u>—</u>
Total real estate mortgage	<u>9,835</u>	<u>168</u>
<b>Real Estate Construction and Land:</b>		
Commercial	—	—
Residential	—	—
Total real estate construction and land	<u>—</u>	<u>—</u>
Total real estate	<u>9,835</u>	<u>168</u>
<b>Commercial:</b>		
Lender finance	—	—
Equipment finance	—	—
Premium finance	—	—
Other asset-based	—	—
Total asset-based	<u>—</u>	<u>—</u>
Equity fund loans	—	—
Venture lending	—	—
Total venture capital	<u>—</u>	<u>—</u>
Secured business loans	82	244
Paycheck Protection Program	—	—
Other lending	55	2,589
Total other commercial	<u>137</u>	<u>2,833</u>
Total commercial	<u>137</u>	<u>2,833</u>
<b>Consumer</b>	<u>425</u>	<u>233</u>
Total charge-offs	<u>\$ 10,397</u>	<u>\$ 3,234</u>

The following table presents recoveries by portfolio segment, class, and subclass for the periods indicated:

<u>Allowance for Credit Losses Recoveries</u>	Three Months Ended	
	March 31,	
	2023	2022
	<i>(In thousands)</i>	
<b>Real Estate Mortgage:</b>		
Commercial real estate	\$ —	\$ —
SBA program	187	12
Hotel	—	—
Total commercial real estate mortgage	187	12
Multi-family	—	—
Residential mortgage	1	151
Investor-owned residential	10	—
Residential renovation	2	—
Total other residential real estate	13	151
Total real estate mortgage	200	163
<b>Real Estate Construction and Land:</b>		
Commercial	—	149
Residential	—	—
Total real estate construction and land	—	149
Total real estate	200	312
<b>Commercial:</b>		
Lender finance	—	—
Equipment finance	—	163
Premium finance	—	—
Other asset-based	231	92
Total asset-based	231	255
Equity fund loans	—	—
Venture lending	363	122
Total venture capital	363	122
Secured business loans	20	30
Paycheck Protection Program	—	—
Other lending	361	1,328
Total other commercial	381	1,358
Total commercial	975	1,735
<b>Consumer</b>	45	21
Total recoveries	\$ 1,220	\$ 2,068



**Deposits**

The following table presents the balance of each major category of deposits as of the dates indicated:

<b>Deposit Composition</b>	<b>March 31, 2023</b>		<b>December 31, 2022</b>	
	<b>Balance</b>	<b>% of Total</b>	<b>Balance</b>	<b>% of Total</b>
<i>(Dollars in thousands)</i>				
Noninterest-bearing demand	\$ 7,030,759	25 %	\$ 11,212,357	33 %
Interest checking	5,307,413	19 %	6,990,377	20 %
Money market	6,220,203	22 %	7,780,758	23 %
Savings	671,918	2 %	577,637	2 %
Total retail non-maturity deposits	19,230,293	68 %	26,561,129	78 %
Wholesale non-maturity deposits	2,028,676	7 %	2,637,362	8 %
Total non-maturity deposits	21,258,969	75 %	29,198,491	86 %
Retail time deposits	2,502,914	9 %	2,434,414	7 %
Brokered time deposits	4,425,678	16 %	2,303,429	7 %
Total time deposits	6,928,592	25 %	4,737,843	14 %
Total deposits	\$ 28,187,561	100 %	\$ 33,936,334	100 %

During the three months ended March 31, 2023, total deposits decreased by \$5.7 billion, or 16.9%, to \$28.2 billion at March 31, 2023 due primarily to a decrease of \$7.3 billion, or 27.6%, in retail non-maturity deposits and a decrease of \$608.7 million in wholesale non-maturity deposits, offset partially by an increase of \$2.2 billion in time deposits. At March 31, 2023, retail non-maturity deposits totaled \$19.2 billion, or 68% of total deposits, including \$7.0 billion of noninterest-bearing demand deposits, or 25% of total deposits.

The following table presents the composition of our deposit portfolio by division as of the dates indicated:

<b>Deposit Composition</b>	<b>March 31, 2023</b>		<b>December 31, 2022</b>		<b>Increase (Decrease)</b>
	<b>Balance</b>	<b>% of Total</b>	<b>Balance</b>	<b>% of Total</b>	
<i>(Dollars in thousands)</i>					
Community Banking	\$ 14,917,027	53 %	\$ 17,466,726	52 %	\$ (2,549,699)
Venture Banking	6,584,554	23 %	11,296,574	33 %	(4,712,020)
Wholesale Deposits	6,685,980	24 %	5,173,034	15 %	1,512,946
Total deposits	\$ 28,187,561	100 %	\$ 33,936,334	100 %	\$ (5,748,773)

As of March 31, 2023, FDIC-insured deposits represented approximately 71% of total deposits, including accounts eligible for pass-through insurance, up from 48% as of December 31, 2022. The Bank’s spot deposit rates were 2.32% at March 31, 2023, up from 1.71% at December 31, 2022.

The following table presents time deposits based on the \$250,000 FDIC insured limit as of the dates indicated:

<b>Time Deposits</b>	<b>March 31, 2023</b>		<b>December 31, 2022</b>	
	<b>Balance</b>	<b>Balance</b>	<b>Balance</b>	<b>Balance</b>
<i>(In thousands)</i>				
Time deposits \$250,000 and under	\$ 5,811,787	\$ 3,198,434		
Time deposits over \$250,000	1,116,805	1,539,409		
Total time deposits	\$ 6,928,592	\$ 4,737,843		

The following table summarizes the maturities of time deposits as of the date indicated:

	<b>Time Deposits</b>		
	<b>\$250,000 and Under</b>	<b>Over \$250,000</b>	<b>Total</b>
<b>March 31, 2023</b>	<i>(In thousands)</i>		
<b>Maturities:</b>			
Due in three months or less	\$ 1,588,860	\$ 347,362	\$ 1,936,222
Due in over three months through six months	1,212,297	150,081	1,362,378
Due in over six months through twelve months	2,382,552	451,076	2,833,628
Total due within twelve months	5,183,709	948,519	6,132,228
Due in over 12 months through 24 months	566,624	162,363	728,987
Due in over 24 months	61,454	5,923	67,377
Total due over twelve months	628,078	168,286	796,364
Total	\$ 5,811,787	\$ 1,116,805	\$ 6,928,592

***Client Investment Funds***

In addition to deposit products, we also offer select clients non-depository cash investment options through PWAM, our registered investment adviser subsidiary, and third-party money market sweep products. PWAM provides customized investment advisory and asset management solutions. At March 31, 2023, total off-balance sheet client investment funds were \$1.2 billion, of which \$0.8 billion was managed by PWAM. At December 31, 2022, total off-balance sheet client investment funds were \$1.4 billion, of which \$0.9 billion was managed by PWAM.

**Credit Quality**

***Nonperforming Assets, Classified Loans and Leases, and Special Mention Loans and Leases***

The following table presents information on our nonperforming assets, classified loans and leases, and special mention loans and leases as of the dates indicated:

	March 31, 2023	December 31, 2022
	<i>(Dollars in thousands)</i>	
Nonaccrual loans and leases held for investment	\$ 87,124	\$ 103,778
Foreclosed assets, net	2,135	5,022
<b>Total nonperforming assets</b>	<b>\$ 89,259</b>	<b>\$ 108,800</b>
Classified loans and leases held for investment	\$ 132,423	\$ 118,271
Special mention loans and leases held for investment	\$ 580,153	\$ 566,259
Nonaccrual loans and leases held for investment to loans and leases held for investment	0.34 %	0.36 %
Nonperforming assets to loans and leases held for investment and foreclosed assets, net	0.35 %	0.38 %
Allowance for credit losses to nonaccrual loans and leases held for investment	327.8 %	281.2 %
Classified loans and leases held for investment to loans and leases held for investment	0.52 %	0.41 %
Special mention loans and leases held for investment to loans and leases held for investment	2.26 %	1.98 %

***Nonaccrual Loans and Leases Held for Investment***

The following table presents our nonaccrual loans and leases held for investment and accruing loans and leases past due between 30 and 89 days by loan portfolio segment and class as of the dates indicated:

	March 31, 2023		December 31, 2022		Increase (Decrease)	
	Nonaccrual	Accruing and 30-89 Days Past Due	Nonaccrual	Accruing and 30-89 Days Past Due	Nonaccrual	Accruing and 30-89 Days Past Due
	<i>(In thousands)</i>					
Real estate mortgage:						
Commercial	\$ 32,996	\$ 1,650	\$ 42,509	\$ 1,047	\$ (9,513)	\$ 603
Multi-family	—	—	—	—	—	—
Other residential	50,060	125,458	55,893	95,654	(5,833)	29,804
<b>Total real estate mortgage</b>	<b>83,056</b>	<b>127,108</b>	<b>98,402</b>	<b>96,701</b>	<b>(15,346)</b>	<b>30,407</b>
Real estate construction and land:						
Commercial	—	—	—	—	—	—
Residential	—	—	—	—	—	—
<b>Total real estate construction and land</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>—</b>
Commercial:						
Asset-based	420	—	865	—	(445)	—
Venture capital	—	—	—	—	—	—
Other commercial	3,123	618	4,345	385	(1,222)	233
<b>Total commercial</b>	<b>3,543</b>	<b>618</b>	<b>5,210</b>	<b>385</b>	<b>(1,667)</b>	<b>233</b>
Consumer	525	1,593	166	1,935	359	(342)
<b>Total held for investment</b>	<b>\$ 87,124</b>	<b>\$ 129,319</b>	<b>\$ 103,778</b>	<b>\$ 99,021</b>	<b>\$ (16,654)</b>	<b>\$ 30,298</b>

During the three months ended March 31, 2023, nonaccrual loan and leases held for investment decreased by \$16.7 million to \$87.1 million at March 31, 2023 due mainly to transfers to accrual status of \$1.8 million, charge-offs of \$9.2 million, and principal and other reductions of \$25.8 million, offset partially by \$20.2 million in additions. As of March 31, 2023, the Company's three largest loan relationships on nonaccrual status had an aggregate carrying value of \$23.8 million and represented 27% of total nonaccrual loans and leases.

**Foreclosed Assets**

The following table presents foreclosed assets (primarily OREO), net of the valuation allowance, by property type as of the dates indicated:

<u>Property Type</u>	<u>March 31,</u> <u>2023</u>	<u>December 31,</u> <u>2022</u>
	<i>(In thousands)</i>	
Commercial real estate	\$ —	\$ —
Single-family residence	2,135	5,022
Total OREO, net	2,135	5,022
Other foreclosed assets	—	—
Total foreclosed assets, net	<u>\$ 2,135</u>	<u>\$ 5,022</u>

During the three months ended March 31, 2023, foreclosed assets decreased by \$2.9 million to \$2.1 million at March 31, 2023 due mainly to sales of \$4.9 million, offset partially by additions of \$2.6 million.

**Classified and Special Mention Loans and Leases Held for Investment**

The following table presents the credit risk ratings of our loans and leases held for investment, net of deferred fees, as of the dates indicated:

<u>Loan and Lease Credit Risk Ratings</u>	<u>March 31,</u> <u>2023</u>	<u>December 31,</u> <u>2022</u>
	<i>(In thousands)</i>	
Pass	\$ 24,959,805	\$ 27,924,599
Special mention	580,153	566,259
Classified	132,423	118,271
Total loans and leases held for investment, net of deferred fees	<u>\$ 25,672,381</u>	<u>\$ 28,609,129</u>

Classified and special mention loans and leases fluctuate from period to period as a result of loan repayments and downgrades or upgrades from our ongoing active portfolio management.

During the three months ended March 31, 2023, special mention loans and leases increased by \$13.9 million to \$580.2 million at March 31, 2023 due mainly to an increase of \$55.8 million in multi-family real estate mortgage special mention loans, offset partially by decreases of \$23.7 million in asset-based commercial special mention loans and \$13.3 million in other residential real estate mortgage special mention loans.

During the three months ended March 31, 2023, classified loans increased by \$14.2 million to \$132.4 million at March 31, 2023 due mainly to increases of \$15.8 million in other residential real estate mortgage classified loans and \$6.7 million in other commercial classified loans, offset partially by a decrease of \$8.1 million in commercial real estate mortgage classified loans.

The following table presents the classified and special mention credit risk rating categories for loans and leases held for investment, net of deferred fees, by loan portfolio segment and class and the related net changes as of the dates indicated:

	March 31, 2023		December 31, 2022		Increase (Decrease)	
	Classified	Special Mention	Classified	Special Mention	Classified	Special Mention
<i>(In thousands)</i>						
Real estate mortgage:						
Commercial	\$ 35,596	\$ 109,020	\$ 43,737	\$ 106,493	\$ (8,141)	\$ 2,527
Multi-family	3,586	116,092	3,611	60,330	(25)	55,762
Other residential	76,382	44,810	60,557	58,063	15,825	(13,253)
Total real estate mortgage	115,564	269,922	107,905	224,886	7,659	45,036
Real estate construction and land:						
Commercial	—	93,641	—	91,334	—	2,307
Residential	—	44,997	—	45,155	—	(158)
Total real estate construction and land	—	138,638	—	136,489	—	2,149
Commercial:						
Asset-based	420	33,133	865	56,836	(445)	(23,703)
Venture capital	2,615	126,422	2,753	127,907	(138)	(1,485)
Other commercial	13,126	5,036	6,473	13,233	6,653	(8,197)
Total commercial	16,161	164,591	10,091	197,976	6,070	(33,385)
Consumer	698	7,002	275	6,908	423	94
Total	\$ 132,423	\$ 580,153	\$ 118,271	\$ 566,259	\$ 14,152	\$ 13,894

**Regulatory Matters**

**Capital**

Bank regulatory agencies measure capital adequacy through standardized risk-based capital guidelines that compare different levels of capital (as defined by such guidelines) to risk-weighted assets and off-balance sheet obligations. At March 31, 2023, banks considered to be “well capitalized” must maintain a minimum Tier 1 leverage ratio of 5.00%, a minimum common equity Tier 1 risk-based capital ratio of 6.50%, a minimum Tier 1 risk-based capital ratio of 8.00%, and a minimum Total risk-based capital ratio of 10.00%.

Basel III currently requires all banking organizations to maintain a 2.50% capital conservation buffer above the minimum risk-based capital requirements to avoid certain limitations on capital distributions, stock repurchases and discretionary bonus payments to executive officers. The capital conservation buffer is exclusively comprised of common equity Tier 1 capital, and it applies to each of the three risk-based capital ratios but not to the leverage ratio. Effective January 1, 2019, the common equity Tier 1, Tier 1, and Total capital ratio minimums inclusive of the capital conservation buffer were 7.00%, 8.50%, and 10.50%. At March 31, 2023, the Company and the Bank were in compliance with the capital conservation buffer requirement.

The Company and the Bank elected the CECL 5-year regulatory transition guidance for calculating regulatory capital ratios and the March 31, 2023 ratios include this election. This regulatory guidance allows an entity to add back to capital 100% of the capital impact from the day one CECL transition adjustment and 25% of subsequent increases to the allowance for credit losses through December 31, 2021. This cumulative amount is now being phased out of regulatory capital evenly over the three years from 2022 to 2024. The add-back as of March 31, 2023 ranged from 0 basis points to 4 basis points for the capital ratios below.

The following tables present a comparison of our actual capital ratios to the minimum required ratios and well capitalized ratios as of the dates indicated:

	Actual	Minimum Required		
		For Capital Adequacy Purposes	For Capital Conservation Buffer	For Well Capitalized Classification
<b>March 31, 2023</b>				
<b>PacWest Bancorp Consolidated:</b>				
Tier 1 leverage capital ratio	8.33%	4.00%	N/A	N/A
CET1 capital ratio	9.21%	4.50%	7.00%	N/A
Tier 1 capital ratio	11.15%	6.00%	8.50%	N/A
Total capital ratio	14.21%	8.00%	10.50%	N/A
<b>Pacific Western Bank:</b>				
Tier 1 leverage capital ratio	8.14%	4.00%	N/A	5.00%
CET1 capital ratio	10.88%	4.50%	7.00%	6.50%
Tier 1 capital ratio	10.88%	6.00%	8.50%	8.00%
Total capital ratio	12.94%	8.00%	10.50%	10.00%

	Actual	Minimum Required		
		For Capital Adequacy Purposes	For Capital Conservation Buffer	For Well Capitalized Classification
<b>December 31, 2022</b>				
<b>PacWest Bancorp Consolidated:</b>				
Tier 1 leverage capital ratio	8.61%	4.00%	N/A	N/A
CET1 capital ratio	8.70%	4.50%	7.00%	N/A
Tier 1 capital ratio	10.61%	6.00%	8.50%	N/A
Total capital ratio	13.61%	8.00%	10.50%	N/A
<b>Pacific Western Bank:</b>				
Tier 1 leverage capital ratio	8.39%	4.00%	N/A	5.00%
CET1 capital ratio	10.32%	4.50%	7.00%	6.50%
Tier 1 capital ratio	10.32%	6.00%	8.50%	8.00%
Total capital ratio	12.34%	8.00%	10.50%	10.00%

The Company's consolidated common equity Tier 1 (CET1), Tier 1, and Total capital ratios increased during the three months ended March 31, 2023 due mainly to positive adjusted earnings combined with a decrease in risk-weighted assets. The consolidated Tier 1 leverage ratio decreased during the three months ended March 31, 2023 due mainly to a \$1.6 billion increase in average assets due mainly to higher levels of on-balance sheet liquidity.

#### ***Subordinated Debt***

We issued or assumed through mergers subordinated debt to trusts that were established by us or entities we acquired, which, in turn, issued trust preferred securities. As of March 31, 2023, the carrying value of subordinated debt totaled \$868.8 million. At March 31, 2023, \$131.0 million of the trust preferred securities were included in the Company's Tier I capital and \$723.6 million were included in Tier II capital.

#### ***Dividends on Common Stock and Interest on Subordinated Debt***

As a bank holding company, PacWest is required to notify and receive approval from the FRB prior to declaring and paying a dividend to common stockholders during any period in which quarterly and/or cumulative twelve-month net earnings are insufficient to fund the dividend amount, among other requirements. Interest payments made on subordinated debt are considered dividend payments under FRB regulations. We may not pay a dividend if the FRB objects or until such time as we receive approval from the FRB or we no longer need to provide notice under applicable regulations. The Company currently is required to receive FRB approval to declare or pay a dividend to stockholders. Further, if the Company defaults or elects to defer the interest payments on its subordinated debt, it is restricted from paying dividends on its Series A preferred and common stock.

#### ***Dividends on Preferred Stock***

The Company's ability to pay dividends on the Series A preferred stock depends on the ability of the Bank to pay dividends to the holding company. The ability of the Company and the Bank to pay dividends in the future is subject to bank regulatory requirements, including capital regulations and policies established by the FRB, the FDIC and the DFPI, as applicable. Dividends on the Series A preferred stock will not be declared, paid, or set aside for payment to the extent such act would cause us to fail to comply with applicable laws and regulations, including applicable FRB capital adequacy regulations and policies.

Dividends on the Series A preferred stock are not cumulative or mandatory. If the Company's Board of Directors does not declare a dividend on the Series A preferred stock in respect of a dividend period, then no dividend shall be deemed to be payable for such dividend period or be cumulative, and the Company will have no obligation to pay any dividend for that dividend period, whether or not the Board of Directors declares a dividend on the Series A preferred stock or any other class or series of its capital stock for any future dividend period. Additionally, so long as any share of Series A preferred stock remains outstanding, unless dividends on all outstanding shares of Series A preferred stock for the most recently completed dividend period have been paid in full or declared and a sum sufficient for the payment thereof has been set aside for payment, no dividend shall be declared or paid or set aside for payment and no distribution shall be declared or made or set aside for payment on the Company's common stock.

## **Liquidity**

### ***Liquidity Management***

Liquidity is the ongoing ability to accommodate liability maturities and deposit withdrawals, fund asset growth and business operations, and meet contractual obligations through unconstrained access to funding at reasonable market rates. Liquidity management involves forecasting funding requirements and maintaining sufficient capacity to meet the needs and accommodate fluctuations in asset and liability levels due to changes in the Company's business operations or unanticipated events.

The ability to have readily available funds sufficient to repay fully maturing liabilities is of primary importance to depositors, creditors, and regulators. The Company's liquidity, represented by cash and due from banks; interest-earning deposits in financial institutions, net of restricted cash collateral accounts; unpledged available-for-sale securities; and unpledged held-to-maturity securities, is a result of the Company's operating, investing, and financing activities and related cash flows. In order to ensure that funds are available when necessary, the Company regularly projects the amount of funds that will be required over a twelve-month period and it also strives to maintain relationships with a diversified customer base. Liquidity requirements can also be met through short-term borrowings or the disposition of short-term assets.

The Company has a formal liquidity policy and, in the opinion of management, its liquid assets are considered adequate to meet cash flow needs for loan funding and deposit cash withdrawals for the next 90 to 120 days. At March 31, 2023, there was \$6.9 billion in liquid assets, comprised of \$218.8 million in cash and due from banks; \$6.3 billion in interest-earning deposits in financial institutions, net of restricted cash accounts; \$292.3 million in unpledged available-for-sale securities; and \$64.4 million in unpledged held-to-maturity securities. In response to the deposit outflow following the two bank closures in March 2023, the Company pledged substantially all of its investment securities portfolio to the FRBSF and FHLB secured borrowing facilities, and borrowed \$4.9 billion under the Bank Term Funding Program supported by the pledged securities collateral. At March 31, 2023, the Company operated with an elevated cash position as a precautionary tactic given the recent deposit volatility. At December 31, 2022, the Company maintained \$6.2 billion in liquid assets, comprised of \$212.3 million in cash and due from banks; \$1.9 billion in interest-earning deposits in financial institutions, net of restricted cash collateral accounts; \$3.7 billion in unpledged available-for-sale securities; and \$416.4 million in unpledged held-to-maturity securities.

While the Company's liquidity increased by only \$696.1 million during the three months ended March 31, 2023, the composition of the liquidity resources shifted to be concentrated in interest-earning deposits in financial institutions compared to the normal tactic of concentrating on-balance sheet liquidity in unpledged securities.

We also maintain available borrowing capacity under secured credit lines with the FHLB and the FRBSF. As a member of the FHLB, the Bank had secured borrowing capacity with the FHLB of \$5.7 billion at March 31, 2023, and \$5.5 billion was borrowed as of that date. The FHLB secured credit line was collateralized by a blanket lien on \$9.7 billion of certain qualifying loans and \$133.4 million of securities. The Bank also had secured borrowing capacity with the FRBSF under the Discount Window program totaling \$5.6 billion at March 31, 2023, all of which was available, and \$4.9 billion under the Bank Term Funding Program, which was fully borrowed as of that date. The FRBSF Discount Window secured credit line was collateralized by liens on \$5.6 billion of qualifying loans and \$1.4 billion of pledged securities, and the Bank Term Funding Program credit line was collateralized by pledged securities with a market value of \$4.3 billion and a par value of \$4.9 billion. The Bank Term Funding Program provides borrowing capacity on qualifying government and government agency guaranteed securities based on the collateral par value.



In addition to its secured lines of credit with the FHLB and FRBSF, the Bank also borrowed \$1.4 billion under a repurchase agreement facility, which was collateralized by \$2.1 billion of loan collateral. The Bank also maintains unsecured lines of credit for the purpose of borrowing overnight funds, subject to availability, of \$130.0 million in the aggregate with several correspondent banks. As of March 31, 2023, there was no balance outstanding related to these unsecured lines of credit. The Bank is a member of the AFX, through which it may either borrow or lend funds on an overnight or short-term basis with a group of pre-approved commercial banks. The availability of funds changes daily. As of March 31, 2023, the Bank had borrowed nothing through the AFX.

Additionally, we generate liquidity from cash flows from our loan and securities portfolios and from our large base of retail non-maturity deposits, defined as noninterest-bearing demand, non-brokered interest checking, savings, and non-brokered money market accounts. At March 31, 2023, retail non-maturity deposits totaled \$19.2 billion and represented 68% of the Company's total deposits. Retail non-maturity deposits are normally less volatile, often with customer relationships tied to other products offered by the Bank promoting long-standing relationships and stable funding sources. See "- Balance Sheet Analysis - Deposits" for additional information and detail of our retail non-maturity deposits.

Our deposit balances may decrease if customers withdraw funds from the Bank. In order to address the Bank's liquidity risk from fluctuating deposit balances, the Bank maintains adequate levels of available liquidity on and off the balance sheet.

We use brokered deposits, the availability of which is uncertain and subject to competitive market forces and regulation, for liquidity management purposes. At March 31, 2023, brokered deposits totaled \$6.5 billion, consisting of \$2.0 billion of non-maturity brokered accounts and \$4.4 billion of brokered time deposits. At December 31, 2022, brokered deposits totaled \$4.9 billion, consisting of \$2.6 billion of non-maturity brokered accounts and \$2.3 billion of brokered time deposits.

### ***Holding Company Liquidity***

PacWest acts a source of financial strength for the Bank which can also include being a source of liquidity. The primary sources of liquidity for the holding company include dividends from the Bank, intercompany tax payments from the Bank, and PacWest's ability to raise capital, issue subordinated debt, and secure outside borrowings. PacWest's ability to obtain funds for the payment of dividends to our stockholders, the repurchase of shares of common stock, and other cash requirements is largely dependent upon the Bank's earnings. The Bank is subject to restrictions under certain federal and state laws and regulations that limit its ability to transfer funds to the holding company through intercompany loans, advances, or cash dividends. PacWest's ability to pay dividends is also subject to the restrictions set forth in Delaware law, by the FRB, and by certain covenants contained in our subordinated debt. See "- Regulatory Matters - Dividends on Preferred Stock" for information regarding the payment of dividends on the Series A preferred stock.

At March 31, 2023, PacWest had \$341.7 million in cash and cash equivalents, of which substantially all was on deposit at the Bank. We believe this amount of cash, along with anticipated future dividends from the Bank, will be sufficient to fund the holding company's cash flow needs over the next 12 months.

Our obligations also include off-balance sheet arrangements consisting of loan commitments, of which only a portion is expected to be funded, and standby letters of credit. At March 31, 2023, our loan commitments and standby letters of credit were \$9.8 billion and \$321.7 million. The loan commitments, a portion of which will eventually result in funded loans, increase our profitability through net interest income when drawn and unused commitment fees prior to being drawn. We manage our overall liquidity taking into consideration funded and unfunded commitments as a percentage of our liquidity sources. Our liquidity sources, as described in "- Liquidity - Liquidity Management," have been and are expected to be sufficient to meet the cash requirements of our lending activities. For further information on loan commitments, see Note 11. *Commitments and Contingencies*, of the Notes to Condensed Consolidated Financial Statements (Unaudited) contained in "Item 1. Condensed Consolidated Financial Statements (Unaudited)."

### ITEM 3. QUANTITATIVE AND QUALITATIVE DISCLOSURES ABOUT MARKET RISK

This analysis should be read in conjunction with text under the caption "*Quantitative and Qualitative Disclosures About Market Risk*" in our Form 10-K, which text is incorporated herein by reference. Our analysis of market risk and market-sensitive financial information contains forward-looking statements and is subject to the disclosure at the beginning of Item 2 regarding such forward-looking information.

#### Market Risk - Foreign Currency Exposure

We enter into foreign exchange contracts with our clients and counterparty banks primarily for the purpose of offsetting or hedging clients' foreign currency exposures arising out of commercial transactions, and we enter into cross currency swaps to hedge exposures to debt instruments denominated in foreign currencies. We have experienced and will continue to experience fluctuations in our net earnings as a result of transaction gains or losses related to revaluing certain asset and liability balances that are denominated in currencies other than the U.S. Dollar and the derivatives that hedge those exposures. As of March 31, 2023, the U.S. Dollar notional amounts of loans receivable and subordinated debt payable denominated in foreign currencies were \$8.7 million and \$27.9 million, and the U.S. Dollar notional amounts of derivatives outstanding to hedge these foreign currency exposures were \$8.6 million and \$28.5 million. We recognized a foreign currency translation net loss of \$0.2 million for the three months ended March 31, 2023 and a foreign currency translation net gain of \$1.2 million for the three months ended March 31, 2022.

#### Asset/Liability Management and Interest Rate Sensitivity

##### *Interest Rate Risk*

We measure our IRR position on a monthly basis using two methods: (i) NII simulation analysis; and (ii) MVE modeling. The Executive ALM Committee and the Finance Committee of the Company's Board of Directors review the results of these analyses quarterly. If hypothetical changes to interest rates cause changes to our simulated net present value of equity and/or net interest income outside our pre-established limits, we may adjust our asset and liability mix in an effort to bring our interest rate risk exposure within our established limits.

We evaluated the results of our NII simulation model and MVE model prepared as of March 31, 2023, the results of which are presented below. Our NII simulation and MVE model indicate that our balance sheet is liability sensitive. A liability sensitive IRR profile would suggest that our estimated NII and MVE would change in the opposite direction of a sudden sustained change in prevailing interest rates.

##### *Net Interest Income Simulation*

We used a NII simulation model to measure the estimated changes in NII that would result over the next 12 months from immediate and sustained changes in interest rates as of March 31, 2023. This model is an interest rate risk management tool and the results are not necessarily an indication of our future net interest income. This model has inherent limitations and these results are based on a given set of rate changes and assumptions at one point in time. We have assumed no growth or changes in the product mix of either our total interest-sensitive assets or liabilities over the next 12 months, therefore the results reflect an interest rate shock to a static balance sheet. For the current quarter, the results of the NII simulation model are exaggerated by the large cash and borrowings positions that existed on March 31, 2023. We expect our NII sensitivity results to reflect less interest rate risk once the large cash and borrowings positions are reduced to more historical levels, which we anticipate happening during the upcoming quarter.

This analysis calculates the difference between NII forecasted using both increasing and decreasing interest rate scenarios using the forward yield curve at March 31, 2023. In order to arrive at the base case, we extend our balance sheet at March 31, 2023 one year and reprice any assets and liabilities that would contractually reprice or mature during that period using the products' pricing as of March 31, 2023. Based on such repricing, we calculate an estimated NII and NIM for each rate scenario.

The NII simulation model is dependent upon numerous assumptions. For example, almost half of our loans are variable rate (excluding hybrid loans), which are assumed to reprice in accordance with their contractual terms. Some loans and investment securities include the opportunity of prepayment (embedded options) and the simulation model uses prepayment assumptions to estimate these accelerated cash flows and reinvest these proceeds at current simulated yields. Our interest-bearing deposits reprice at our discretion and are assumed to reprice at a rate less than the change in market rates. The 12-month NII simulation model as of March 31, 2023 assumes interest-bearing deposits reprice at 52% and total deposits reprice at 39% of the change in market rates in a rising interest rate scenario, depending on the amount of the rate change (this is commonly referred to as the "deposit beta"). The effects of certain balance sheet attributes, such as fixed-rate loans, interest rate floors on variable-rate loans, and the volume of noninterest-bearing deposits as a percentage of earning assets, impact our assumptions and consequently the results of our NII simulation model. Additionally, we assume that all market interest rates have an interest rate floor of 0%. Changes that could vary significantly from our assumptions include loan and deposit growth or contraction, loan and deposit pricing, changes in the mix of earning assets or funding sources, and future asset/liability management decisions, all of which may have significant effects on our net interest income.

The following table presents forecasted net interest income and net interest margin for the next 12 months using the static balance sheet as of March 31, 2023 and forward yield curve as of March 31, 2023 (which presumes one interest rate cut over a twelve month horizon) as the base scenario, with immediate and sustained parallel upward and downward movements in interest rates of 100, 200, and 300 basis points as of the date indicated:

March 31, 2023 Static Balance Sheet	Forecasted Net Interest Income (Tax Equivalent)	Percentage Change From Base	Forecasted Net Interest Margin (Tax Equivalent)	Forecasted Net Interest Margin Change From Base
<i>(Dollars in millions)</i>				
<b>Interest Rate Scenario:</b>				
Up 300 basis points	\$ 830.1	(11.9)%	1.96%	(0.26)%
Up 200 basis points	\$ 863.5	(8.4)%	2.04%	(0.18)%
Up 100 basis points	\$ 896.7	(4.8)%	2.12%	(0.10)%
BASE CASE	\$ 942.2	—	2.22%	
Down 100 basis points	\$ 993.7	5.5%	2.34%	0.12%
Down 200 basis points	\$ 1,043.1	10.7%	2.46%	0.24%
Down 300 basis points	\$ 1,092.1	15.9%	2.58%	0.36%

During the three months ended March 31, 2023, total base case year 1 tax equivalent NII decreased by \$333.1 million or 26% to \$942.2 million at March 31, 2023 compared to December 31, 2022, and the base case tax equivalent NIM decreased to 2.22% at March 31, 2023 from 3.21% at December 31, 2022. The decrease in year 1 NII and tax equivalent NIM compared to the December 31, 2022 forecasted NII and NIM was attributable to the change in the funding mix at March 31, 2023 compared to December 31, 2022, as the average balance of noninterest-bearing deposits decreased by \$4.2 billion, the average balance of interest-bearing deposits decreased by \$1.6 billion, and the average balance of borrowings increased by \$10.0 billion. These funding mix changes resulted in a \$541 million increase in forecasted interest expense. The interest expense increase was offset partially by a \$208 million increase in interest income, due primarily to the \$4.5 billion increase in interest-earning deposits in financial institutions. The change in the funding mix at March 31, 2023 from December 31, 2022 was in response to recent industry events. For further discussion on these recent industry events and their impact on the Company, see "Recent Events – Impact of Two Bank Closures" contained herein.

In addition to parallel interest rate shock scenarios, we also model various alternative rate vectors. The most favorable alternate rate vector that we model is the "Gradual Decrease" scenario, which applies a parallel ramped decrease to the yield curve over an 18 month horizon. In the "Gradual Decrease" scenario, Year 1 tax equivalent NII decreases by 4.2%. The most unfavorable alternate rate vector that we model is the "Gradual Increase" scenario, in which rates increase over an 18 month ramped horizon. In the "Gradual Increase" scenario, Year 1 tax equivalent NII decreases by 6.4%.

At March 31, 2023, we had \$28.6 billion of total gross loans that included \$12.2 billion or 43% with variable interest rate terms (excluding hybrid loans discussed below). Of the variable interest rate loans, \$10.94 billion, or 90%, contained interest rate floor provisions, which included \$10.90 billion of loans that were at or above their floors and only \$39.2 million of loans below their floors.

At March 31, 2023, we also had \$6.1 billion of variable-rate hybrid loans, representing 21% of total loans, which do not reprice immediately because the loans contain an initial fixed-rate period before they become variable. The cumulative amounts of hybrid loans that would switch from being fixed-rate to variable-rate because the initial fixed-rate term would expire were approximately \$92.5 million, \$447.0 million, and \$1.1 billion in the next one, two, and three years.

LIBOR is expected to be phased out in 2023, as such the Company stopped originations of LIBOR-indexed loans effective December 31, 2021. The business processes impacted relate primarily to our variable-rate loans and our subordinated debt, both of which are indexed to LIBOR. For further information, see Item 7A. "Risk Factors" of our Annual Report on Form 10-K for the year ended December 31, 2022.

**Market Value of Equity**

We measure the impact of market interest rate changes on the net present value of estimated cash flows from our assets, liabilities, and off-balance sheet items, defined as the market value of equity, using our MVE model. This simulation model assesses the changes in the market value of our interest-sensitive financial instruments that would occur in response to an instantaneous and sustained increase and decrease in market interest rates of 100, 200, and 300 basis points. This analysis assigns significant value to our noninterest-bearing deposit balances. The projections include various assumptions regarding cash flows and interest rates and are by their nature forward-looking and inherently uncertain.

The MVE model is an interest rate risk management tool and the results are not necessarily an indication of our actual future results. Actual results may vary significantly from the results suggested by the market value of equity table. Loan prepayments and deposit attrition, changes in the mix of our earning assets or funding sources, and future asset/liability management decisions, among others, may vary significantly from our assumptions. The base case is determined by applying various current market discount rates to the estimated cash flows from the different types of assets, liabilities, and off-balance sheet items existing at March 31, 2023.

The following table shows the projected change in the market value of equity for the rate scenarios presented as of the date indicated:

<b>March 31, 2023</b>	<b>Projected Market Value of Equity</b>	<b>Dollar Change From Base</b>	<b>Percentage Change From Base</b>	<b>Percentage of Total Assets</b>	<b>Ratio of Projected Market Value to Book Value</b>
<i>(Dollars in millions)</i>					
<b>Interest Rate Scenario:</b>					
Up 300 basis points	\$ 5,225.8	\$ (728.7)	(12.2)%	11.8 %	188.6 %
Up 200 basis points	\$ 5,492.8	\$ (461.7)	(7.8)%	12.4 %	198.2 %
Up 100 basis points	\$ 5,734.3	\$ (220.3)	(3.7)%	12.9 %	206.9 %
BASE CASE <sup>(1)</sup>	\$ 5,954.5	\$ —	—%	13.4 %	214.9 %
Down 100 basis points	\$ 6,158.1	\$ 203.6	3.4 %	13.9 %	222.2 %
Down 200 basis points	\$ 6,386.6	\$ 432.1	7.3 %	14.4 %	230.4 %
Down 300 basis points	\$ 6,439.5	\$ 485.0	8.1 %	14.5 %	232.3 %

(1) The base case of projected market value of equity is approximately 2.15 times the Company's total stockholders' equity as of March 31, 2023 and December 31, 2022. The MVE methodology and the application of the various assumptions as of March 31, 2023 are consistent with December 31, 2022.

During the three months ended March 31, 2023, total base case projected market value of equity decreased from December 31, 2022 by \$2.5 billion to \$6.0 billion at March 31, 2023. This decrease in base case projected MVE was due mostly to: (1) a \$1.9 billion increase in the mark-to-market adjustment for total deposits, borrowings, and subordinated debt, offset partially by (2) a \$456.2 million increase in the mark-to-market adjustment for loans and leases; (3) a \$42.1 million decrease in the mark-to-market adjustment for investment securities held-to-maturity; and (4) a \$1.18 billion decrease in the book value of stockholders' equity. The decrease in the book value of stockholders' equity was due mainly to a \$1.20 billion net loss attributable primarily to a \$1.38 billion goodwill impairment charge and \$29.5 million of common stock cash dividends paid, offset partially by a \$54.8 million decline in accumulated other comprehensive loss.

**ITEM 4. CONTROLS AND PROCEDURES**

As of the end of the period covered by this report, an evaluation was carried out by the Company's management, with the participation of the Chief Executive Officer and the Chief Financial Officer, of the effectiveness of the Company's disclosure controls and procedures (as defined in Rule 13a-15(e) under the Securities Exchange Act of 1934). Based upon that evaluation, the Chief Executive Officer and Chief Financial Officer concluded that, as of the end of the period covered by this report, these disclosure controls and procedures were effective.

There have been no changes in the Company's internal control over financial reporting (as defined in Rule 13a-15(f) under the Securities Exchange Act of 1934) during our most recent fiscal quarter that have materially affected, or are reasonably likely to materially affect, the Company's internal control over financial reporting.

**PART II. OTHER INFORMATION****ITEM 1. LEGAL PROCEEDINGS**

The information set forth in Note 11. *Commitments and Contingencies* in the Notes to Condensed Consolidated Financial Statements (Unaudited) is incorporated herein by reference.

In addition, in the ordinary course of our business, we are party to various legal actions, which we believe are incidental to the operation of our business. The outcome of such legal actions and the timing of ultimate resolution are inherently difficult to predict. In the opinion of management, based upon information currently available to us, any resulting liability, in addition to amounts already accrued, and taking into consideration insurance which may be applicable, would not have a material adverse effect on the Company's financial statements or operations.

**ITEM 1A. RISK FACTORS**

For information regarding factors that could affect the Company's results of operations, financial condition and liquidity, see the risk factors disclosed in the "Risk Factors" section of our Annual Report on Form 10-K for the year ended December 31, 2022. See also "Forward-Looking Information" disclosed in Part I, Item 2 of this quarterly report on Form 10-Q and the updated Risk Factors below:

***We are subject to liquidity risk, including changes in the levels and sources of liquidity as highlighted by the recent events in the banking industry, which have adversely affected, and could continue to adversely affect, our business, financial condition, and results of operations.***

Effective liquidity management is essential for the operation of our business. Our primary source of liquidity is deposits from our customers, which may be impacted by market-related forces such as increased competition for these deposits and a variety of other factors. Deposits across the banking industry have been declining in recent quarters in large part due to the increased interest rate environment. Given the turmoil in the banking industry, we, like many other banks, experienced additional deposit outflows as customers spread deposits among several different banks to maximize their amount of FDIC insurance, moved deposits to banks deemed "too big to fail," or removed deposits from the U.S. banking industry. Customers with uninsured deposits may be more likely to withdraw funds, particularly if there is negative news surrounding the Bank or perceived risks regarding its safety. Our ability to attract depositors during a time of actual or perceived distress or instability in the banking industry may be limited. In addition, these developments have negatively impacted customer confidence in the safety and soundness of regional banks, such as the Bank. If the Bank is unable to continue to fund assets through customer bank deposits or access funding sources on favorable terms, or if the Bank suffers an increase in borrowing costs or otherwise fails to manage liquidity effectively, the Bank's prospects, liquidity, operating margins, financial condition and results of operations may be materially adversely affected.

***Problems encountered by, or adverse news concerning, other financial institutions has adversely affected financial and capital markets generally as well as the Bank, and may continue to do so.***

The soundness and stability of financial institutions are closely interrelated as a result of credit, trading, clearing, and other relationships between institutions. As a result, concerns about, or a default or threatened default by, or failure or threatened failure of, one or more institutions could lead to significant market-wide liquidity problems, losses or defaults by us or other institutions, or credit risk in the event of default of our counterparty or customer. Even rumors or adverse news developments concerning other financial institutions or the Bank may result in rapid deterioration in investor and customer confidence. This interconnectedness of financial institutions has been starkly evidenced by the recent events affecting the banking industry, as banks including the Bank have been impacted by concerns regarding the soundness or creditworthiness of other financial institutions, which has caused substantial and cascading disruption within the financial markets and increased expenses and has adversely impacted the market price and volatility of the Bank's common stock.

In addition to the disruption of financial, credit and capital markets, and the increase volatility in our stock, the recent banking industry events may have other adverse impacts on the Bank. For example, these developments may result in increased regulatory requirements and scrutiny, increasing our costs and adversely affecting our profitability. In addition, the premiums of the FDIC's deposit insurance program are expected to increase. Changes resulting from these events could include increased regulatory oversight, higher capital requirements or changes in the way regulatory capital is calculated, and impositions of additional restrictions through regulatory changes or supervisory or enforcement activities, and, as a result, our operating margins, financial condition and results of operations may be materially adversely affected.

***We recently reduced our quarterly common stock dividend to \$0.01 per share, and there can be no assurance regarding when or if we will increase our common stock dividend to prior levels.***

Our stockholders are only entitled to receive such dividends as our Board may declare out of funds legally available for such payments. As a result of the recent events affecting the banking industry and their impact on the Bank, including, among other things, our goodwill impairment of \$1.38 billion recorded due to the decline in our stock price as a result of recent market volatility, we have reduced our quarterly common stock dividend to \$0.01 per share. There can be no assurances as to when or if we will increase our common stock dividend. In addition to stabilization in the banking industry and the return to normalization of our business, our ability to pay dividends will continue to be subject to the restrictions set forth in Delaware law, by the FRB, and by certain covenants contained in our subordinated debt. Notification to the FRB is required prior to our declaring and paying a cash dividend during any period in which our quarterly and/or cumulative twelve-month net earnings are insufficient to fund the dividend amount, among other requirements. Accordingly, the impact of the goodwill impairment charge on net earnings in the first quarter of 2023 will require us to receive approval from the FRB prior to declaring a dividend from March 31, 2023 through March 31, 2024. In addition, we may be restricted by applicable law or regulation or actions taken by our regulators, now or in the future, from paying dividends to our stockholders.

***A further reduction in our credit ratings could adversely affect our access to capital and could increase our cost of funds.***

The credit rating agencies regularly evaluate the Company and the Bank, and credit ratings are based on a number of factors, including our financial strength and ability to generate earnings, as well as factors not entirely within our control, including conditions affecting the financial services industry, the economy, and changes in rating methodologies. On April 14, 2023, a credit rating agency, Fitch, downgraded the Company's and the Bank's short-term and long-term issuer ratings and removed them from rating watch negative, and downgraded the Bank's long-term rating. There can be no assurance that we will maintain our current credit ratings. A further downgrade of the credit ratings of the Company or the Bank could further adversely affect our access to liquidity and capital and could significantly increase our cost of funds, trigger additional collateral or funding requirements, and decrease the number of investors and counterparties willing to lend to us or purchase our securities, reducing our ability to generate earnings.

**ITEM 2. UNREGISTERED SALES OF EQUITY SECURITIES AND USE OF PROCEEDS**

The following table presents stock purchases made during the first quarter of 2023:

<b>Purchase Dates</b>	<b>Total Number of Shares Purchased <sup>(1)</sup></b>	<b>Average Price Paid Per Share</b>	<b>Total Number of Shares Purchased as Part of Publicly Announced Program <sup>(2)</sup></b>	<b>Maximum Dollar Value of Shares That May Yet Be Purchased Under the Program <sup>(2)</sup></b>
<i>(Dollars in thousands, except per share amounts)</i>				
January 1 - January 31, 2023	79,968	\$ 27.66	—	\$ 100,000
February 1 - February 28, 2023	66,335	\$ 27.75	—	\$ —
March 1 - March 31, 2023	—	\$ —	—	\$ —
Total	<u>146,303</u>	<u>\$ 27.70</u>	<u>—</u>	<u>—</u>

(1) Shares repurchased pursuant to net settlement by employees in satisfaction of income tax withholding obligations incurred through the vesting of Company stock awards.

(2) On February 15, 2022, PacWest's Board authorized a new Stock Repurchase Program, effective March 1, 2022, to repurchase shares of its common stock for an aggregate purchase price not to exceed \$100 million with a program maturity date of February 28, 2023. No shares were repurchased under the new Stock Repurchase Program prior to its maturity.

**ITEM 6. INDEX TO EXHIBITS**

<b>Exhibit Number</b>	<b>Description</b>
10.1*	<a href="#"><u>Form of Non-Employee Director Stock Award Agreement and Grant Notice pursuant to the Company's Amended and Restated PacWest Bancorp 2017 Stock Incentive Plan (Filed herewith).</u></a>
31.1	<a href="#"><u>Section 302 Certification of Chief Executive Officer (Filed herewith).</u></a>
31.2	<a href="#"><u>Section 302 Certification of Chief Financial Officer (Filed herewith).</u></a>
32.1	<a href="#"><u>Section 906 Certification of Chief Executive Officer (Filed herewith).</u></a>
32.2	<a href="#"><u>Section 906 Certification of Chief Financial Officer (Filed herewith).</u></a>
101	Interactive data files pursuant to Rule 405 of Regulation S-T formatted in Inline XBRL: (i) <a href="#"><u>the Condensed Consolidated Balance Sheets as of March 31, 2023 and December 31, 2022,</u></a> (ii) <a href="#"><u>the Condensed Consolidated Statements of Earnings for the three months ended March 31, 2023 and 2022,</u></a> (iii) <a href="#"><u>the Condensed Consolidated Statements of Comprehensive Income (Loss) for the three months ended March 31, 2023 and 2022,</u></a> (iv) <a href="#"><u>the Condensed Consolidated Statement of Changes in Stockholders' Equity for the three months ended March 31, 2023 and 2022,</u></a> (v) <a href="#"><u>the Condensed Consolidated Statements of Cash Flows for the three months ended March 31, 2023 and 2022,</u></a> and (vi) <a href="#"><u>the Notes to Condensed Consolidated Financial Statements. (Pursuant to Rule 406T of Regulation S-T, this information is deemed furnished and not filed for purposes of Sections 11 and 12 of the Securities Act of 1933 and Section 18 of the Securities Exchange Act of 1934.)</u></a> (Filed herewith).
104	Cover page of PacWest Bancorp's Quarterly Report on Form 10-Q formatted as Inline XBRL and contained in Exhibit 101.

\* Instruments defining the rights of long-term debt holders have been omitted pursuant to Item 601(b)(4)(iii)(A) of Regulation S-K. The Company will furnish a copy of any omitted schedule or exhibit to the Securities and Exchange Commission upon request.



## Signatures

Pursuant to the requirements of Section 13 or 15(d) of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned, thereunto duly authorized.

Date: May 10, 2023

PACWEST BANCORP

/s/ Kevin L. Thompson

Kevin L. Thompson

*Executive Vice President, Chief Financial Officer*

*(Principal Financial Officer)*

**PACWEST BANCORP  
STOCK INCENTIVE PLAN  
NOTICE OF STOCK AWARD GRANT**

This Notice of Stock Award Grant is part of the Stock Award Agreement between Grantee and the Company dated \_\_\_\_\_ and is of no force and effect until the Stock Award Agreement is signed by Grantee and the Company’s representative and this Notice of Stock Award Grant is signed by Grantee.

You have been granted the following Stock Award:

Name of Grantee: \_\_\_\_\_

Total Number of Shares Granted:  
("Granted Stock") \_\_\_\_\_

Type of Stock Award: Restricted Stock Award

Date of Grant: \_\_\_\_\_

Vesting Schedule: \_\_\_\_\_

Vesting Commencement Date: \_\_\_\_\_

Please sign below to acknowledge the terms and conditions of this Stock Award.

**ACKNOWLEDGED BY GRANTEE:**

By: \_\_\_\_\_

Name: \_\_\_\_\_

**PACWEST BANCORP  
STOCK INCENTIVE PLAN  
STOCK AWARD AGREEMENT**

1. *Definitions.* Unless otherwise defined herein, the terms defined in the Amended and Restated PacWest Bancorp 2017 Stock Incentive Plan (the “Plan”) shall have the same defined meanings in this Stock Award Agreement (“Agreement”) and the Notice of Stock Award Grant attached hereto as Appendix A.

2. *Grant of Stock Award.* Pursuant to the terms and conditions set forth in the Notice of Stock Award Grant, this Agreement, and the Plan, PacWest Bancorp (the “Company”) grants to the grantee named in the Notice of Stock Award Grant (“Grantee”) on the date of grant set forth in the Notice of Stock Award Grant (“Date of Grant”) the number of Shares set forth in the Notice of Stock Award Grant. This Stock Award is intended to be a Restricted Stock Award, as provided in the Notice of Stock Award Grant.

3. *Vesting.* The Grantee shall vest in the Granted Stock in accordance with the vesting schedule provided for in the Notice of Stock Award Grant; provided, however, that the Grantee shall cease vesting in the Granted Stock on the Grantee’s Termination Date. Notwithstanding the foregoing, upon the occurrence of a Vesting Event, the Grantee shall become 100% vested in those shares of Granted Stock that are outstanding on the date of the Vesting Event.

4. *Risk of Forfeiture.*

(a) *General Rule.* The Granted Stock shall initially be subject to a Risk of Forfeiture. The Shares subject to a Risk of Forfeiture shall be referred to herein as “Restricted Shares”.

(b) *Lapse of Risk of Forfeiture.* The Risk of Forfeiture shall lapse as the Grantee vests in the Granted Stock.

(c) *Forfeiture of Granted Stock.* The Restricted Shares shall automatically be forfeited and immediately returned to the Company on the Grantee’s Termination Date.

(d) *Additional Shares or Substituted Securities.* In the event of a stock split, reverse stock split, stock dividend, recapitalization, combination or reclassification of the Common Stock or any other increase or decrease in the number of issued and outstanding Shares effected without receipt of consideration by the Company, any new, substituted or additional securities or other property (including money paid other than as an ordinary cash dividend) which are by reason of such transaction distributed with respect to any Restricted Shares or into which such Restricted Shares thereby become convertible shall immediately be subject to a Risk of Forfeiture, which Risk of Forfeiture shall lapse at the same time and in the same manner as the Risk of Forfeiture to which the corresponding Restricted Share is subject.

(e) *Escrow.* Upon issuance, the stock certificates for Granted Stock shall be deposited in escrow with the Company to be held in accordance with the provisions of this Agreement. Any new, substituted or additional securities or other property described in Subsection (d) above shall immediately be delivered to the Company to be held in escrow, but only to the extent the shares of Granted Stock are at the time Restricted Shares. Restricted Shares, together with any other assets or securities held in escrow hereunder, shall be (i) surrendered to the Company for cancellation upon forfeiture of the Restricted Shares; or (ii) released to the Grantee upon the Grantee’s request to the Administrator on or after the date the shares of Granted Stock are no longer Restricted Shares. Grantee agrees not to make a request to the Company’s transfer agent for delivery of any share certificates representing any shares of Granted Stock so long as such shares are Restricted Shares.

5. *Rights as a Stockholder.* The Grantee shall not be entitled to vote any unvested shares of Granted Stock or receive any dividends on any unvested shares of Granted Stock. Upon the vesting of any portion of the Stock Award, the Grantee shall have dividend and voting rights with respect to any such vested shares of Granted Stock.

6. *Non-transferability of Stock Award.* Except as otherwise provided for in the Plan, this Stock Award may not be sold, pledged, assigned, hypothecated, transferred, or disposed of in any manner other than by will or by the laws of descent and distribution and may be exercised, during the lifetime of the Grantee, only by the Grantee. If the Grantee transfers all or part of this Stock Award pursuant to the previous sentence, then the terms of this Agreement, the Plan and the Notice of Stock Award shall apply to the transferee to the same extent as to the Grantee.

7. *Regulatory Compliance.* The issuance of Common Stock pursuant to this Agreement shall be subject to full compliance with all then applicable requirements of law and the requirements of any stock exchange or interdealer quotation system upon which the Common Stock may be listed or traded.

8. *Modification and Termination.* The rights of the Grantee are subject to modification and termination in certain events, as provided in the Plan.

9. *Taxes.* The Company’s obligation to deliver Shares or remove any restrictive legends upon vesting of such Shares under the Plan shall be subject to the satisfaction of all applicable federal, state and local income and employment tax withholding requirements, if any. The Grantee acknowledges that the Grantee is solely responsible for any taxes with respect to the issuance, vesting or disposition of the Granted Stock. The Grantee further acknowledges that the Company makes no representations regarding the tax consequences of this Stock Award, including, but not limited to, the issuance, vesting or disposition of the Granted Stock.

10. *Governing Law.* This Agreement shall be governed by and interpreted in accordance with the internal laws of the State of California without regard to principles of conflict of laws.

11. *Successors.* This Agreement shall inure to the benefit of and be binding upon the parties hereto and their legal representatives, heirs, and permitted transferees, successors and assigns.

12. *Plan.* This Agreement and the Notice of Stock Award Grant are subject to all of the terms and provisions of the Plan, receipt of a copy of which is hereby acknowledged by the Grantee. The Grantee hereby agrees to accept as binding, conclusive, and final all decisions and interpretations of the Administrator upon any questions arising under the Plan, this Agreement, and the Notice of Stock Award Grant.

13. *Rights to Continued Service.* This Stock Award does not confer upon the Grantee any right to continue in the Service of the Company or any Affiliate.

14. *Entire Agreement.* The Notice of Stock Award Grant, this Agreement, and the Plan constitute the entire contract between the parties hereto with regard to the subject matter hereof. They supersede any other agreements, representations or understandings (whether oral or written and whether express or implied) between the parties which relate to the subject matter hereof.

By your signature and the signature of the Company’s representative below, you and the Company agree that this Stock Award is granted under and governed by the terms and conditions of this Agreement and the Plan and the Notice of Stock Award Grant, both of which are attached and incorporated herein by reference. This Stock Award is of no force and effect until this Agreement is signed by you and the Company’s representative and the Notice of Stock Award Grant is signed by you.

**GRANTEE:**

**PACWEST BANCORP**

By: \_\_\_\_\_  
Name: \_\_\_\_\_

By: \_\_\_\_\_  
Name: \_\_\_\_\_

**Certification**  
**Pursuant to Section 302 of the**  
**Sarbanes-Oxley Act of 2002**

I, Paul W. Taylor, certify that:

1. I have reviewed this report on Form 10-Q for the quarterly period ended March 31, 2023 of PacWest Bancorp;
2. Based on my knowledge, this report does not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made, in light of the circumstances under which such statements were made, not misleading with respect to the period covered by this report;
3. Based on my knowledge, the financial statements, and other financial information included in this report, fairly present in all material respects the financial condition, results of operations and cash flows of the registrant as of, and for, the periods presented in this report;
4. The registrant's other certifying officer and I are responsible for establishing and maintaining disclosure controls and procedures (as defined in Exchange Act Rules 13a-15(e) and 15d-15(e)) and internal control over financial reporting (as defined in Exchange Act Rules 13a-15(f) and 15d-15(f)) for the registrant and have:
  - (a) Designed such disclosure controls and procedures, or caused such disclosure controls and procedures to be designed under our supervision, to ensure that material information relating to the registrant, including its consolidated subsidiaries, is made known to us by others within those entities, particularly during the period in which this report is being prepared;
  - (b) Designed such internal control over financial reporting, or caused such internal control over financial reporting to be designed under our supervision, to provide reasonable assurance regarding the reliability of financial reporting and the preparation of financial statements for external purposes in accordance with generally accepted accounting principles.
  - (c) Evaluated the effectiveness of the registrant's disclosure controls and procedures and presented in this report our conclusions about the effectiveness of the disclosure controls and procedures, as of the end of the period covered by this report based on such evaluation; and
  - (d) Disclosed in this report any change in the registrant's internal control over financial reporting that occurred during the registrant's most recent fiscal quarter (the registrant's fourth fiscal quarter in the case of an annual report) that has materially affected, or is reasonably likely to materially affect, the registrant's internal control over financial reporting; and
5. The registrant's other certifying officer and I have disclosed, based on our most recent evaluation of internal control over financial reporting, to the registrant's auditors and the audit committee of the registrant's board of directors (or persons performing the equivalent functions):
  - (a) All significant deficiencies and material weaknesses in the design or operation of internal control over financial reporting which are reasonably likely to adversely affect the registrant's ability to record, process, summarize and report financial information; and
  - (b) Any fraud, whether or not material, that involves management or other employees who have a significant role in the registrant's internal control over financial reporting.

Date: May 10, 2023

/s/ Paul W. Taylor

Paul W. Taylor  
*President and Chief Executive Officer*

**Certification  
Pursuant to Section 302 of the  
Sarbanes-Oxley Act of 2002**

I, Kevin L. Thompson, certify that:

1. I have reviewed this report on Form 10-Q for the quarterly period ended March 31, 2023 of PacWest Bancorp;
2. Based on my knowledge, this report does not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made, in light of the circumstances under which such statements were made, not misleading with respect to the period covered by this report;
3. Based on my knowledge, the financial statements, and other financial information included in this report, fairly present in all material respects the financial condition, results of operations and cash flows of the registrant as of, and for, the periods presented in this report;
4. The registrant's other certifying officer and I are responsible for establishing and maintaining disclosure controls and procedures (as defined in Exchange Act Rules 13a-15(e) and 15d-15(e)) and internal control over financial reporting (as defined in Exchange Act Rules 13a-15(f) and 15d-15(f)) for the registrant and have:
  - (a) Designed such disclosure controls and procedures, or caused such disclosure controls and procedures to be designed under our supervision, to ensure that material information relating to the registrant, including its consolidated subsidiaries, is made known to us by others within those entities, particularly during the period in which this report is being prepared;
  - (b) Designed such internal control over financial reporting, or caused such internal control over financial reporting to be designed under our supervision, to provide reasonable assurance regarding the reliability of financial reporting and the preparation of financial statements for external purposes in accordance with generally accepted accounting principles.
  - (c) Evaluated the effectiveness of the registrant's disclosure controls and procedures and presented in this report our conclusions about the effectiveness of the disclosure controls and procedures, as of the end of the period covered by this report based on such evaluation; and
  - (d) Disclosed in this report any change in the registrant's internal control over financial reporting that occurred during the registrant's most recent fiscal quarter (the registrant's fourth fiscal quarter in the case of an annual report) that has materially affected, or is reasonably likely to materially affect, the registrant's internal control over financial reporting; and
5. The registrant's other certifying officer and I have disclosed, based on our most recent evaluation of internal control over financial reporting, to the registrant's auditors and the audit committee of the registrant's board of directors (or persons performing the equivalent functions):
  - (a) All significant deficiencies and material weaknesses in the design or operation of internal control over financial reporting which are reasonably likely to adversely affect the registrant's ability to record, process, summarize and report financial information; and
  - (b) Any fraud, whether or not material, that involves management or other employees who have a significant role in the registrant's internal control over financial reporting.

Date: May 10, 2023

/s/ Kevin L. Thompson

Kevin L. Thompson  
*Executive Vice President and Chief Financial Officer*

**Certification of Chief Executive Officer Pursuant to 18 U.S.C. Section 1350, as Adopted  
Pursuant to Section 906 of the  
Sarbanes-Oxley Act of 2002**

Pursuant to Section 906 of the Sarbanes-Oxley Act of 2002 (18 U.S.C. Section 1350), the undersigned officer of PacWest Bancorp (the “Company”) hereby certifies that the Company’s Quarterly Report on Form 10-Q for the quarterly period ended March 31, 2023 (the “Report”) fully complies with the requirements of Section 13(a) or 15(d), as applicable, of the Securities Exchange Act of 1934 and that the information contained in the Report fairly presents, in all material respects, the financial condition and results of operations of the Company.

Date: May 10, 2023

/s/ Paul W. Taylor

Paul W. Taylor

*President and Chief Executive Officer*

The foregoing certification is being furnished solely pursuant to Section 906 of the Sarbanes-Oxley Act of 2002 (18 U.S.C. Section 1350) and is not being filed as part of the Report or as a separate disclosure document.

**Certification of Chief Financial Officer Pursuant to 18 U.S.C. Section 1350, as Adopted  
Pursuant to Section 906 of the  
Sarbanes-Oxley Act of 2002**

Pursuant to Section 906 of the Sarbanes-Oxley Act of 2002 (18 U.S.C. Section 1350), the undersigned officer of PacWest Bancorp (the “Company”) hereby certifies that the Company’s Quarterly Report on Form 10-Q for the quarterly period ended March 31, 2023 (the “Report”) fully complies with the requirements of Section 13(a) or 15(d), as applicable, of the Securities Exchange Act of 1934 and that the information contained in the Report fairly presents, in all material respects, the financial condition and results of operations of the Company.

Date: May 10, 2023

/s/ Kevin L. Thompson

\_\_\_\_\_  
Kevin L. Thompson

*Executive Vice President and Chief Financial Officer*

The foregoing certification is being furnished solely pursuant to Section 906 of the Sarbanes-Oxley Act of 2002 (18 U.S.C. Section 1350) and is not being filed as part of the Report or as a separate disclosure document.



# INSURED CASH SWEEP®

**A one stop solution for full FDIC insurance on deposit amounts larger than \$250,000.\***

## One Bank

Everything is handled through Pacific Western Bank. Your large deposit is broken into smaller amounts under \$250,000 and placed with other ICS Network banks, which means your entire investment is eligible for FDIC insurance. By working with just one bank – Pacific Western Bank – you can receive insurance from many.

## 24/7 Access

Your ICS balance is accessible on Online Banking and available for withdrawal or transfer per the Deposit Placement Agreement (“DPA”). In addition, you receive access to view the ICS Depositor Control Panel which outlines fund placement.

## One Statement

You receive a combined month-end statement listing the placement of your funds. With ICS, there’s no need to manually consolidate statements, track changing collateral values, or use private surety bonds. It’s that simple.

## How It Works

1. You complete our ICS agreements after identifying an existing Pacific Western Bank account to be used for the daily sweep.
2. You receive confirmation the sweep is set up and instructions on how to access the ICS Depositor Control Panel.
3. Funds are deposited into the ICS account and distributed to other ICS Network banks in amounts less than \$250,000.
4. You can check balances and see where your funds are at all times using the Depositor Control Panel.
5. You receive consolidated interest payments and combined monthly statements available in Online Banking.

*\*The FDIC insurance maximum per insured depositor per bank is \$250,000.*

*Placement of funds through the ICS service is subject to the terms, conditions, and disclosures in the service agreements, including the Deposit Placement Agreement (“DPA”). Limits and customer eligibility criteria apply. Unlimited program withdrawals are available with ICS only when using the ICS demand option.*



**PACWEST.COM**

Pacific Western Bank is an equal opportunity lender. This is not a commitment to lend. All offers of credit are subject to credit approval.



## Coversheet

### Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter School

**Section:** V. Items Scheduled For Action  
**Item:** L. Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter School  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 23-24 BCCS Declaration of Need (cl500).pdf



State of California  
Commission on Teacher Credentialing  
Certification Division  
1900 Capitol Avenue  
Sacramento, CA 95811-4213

Email: [credentials@ctc.ca.gov](mailto:credentials@ctc.ca.gov)  
Website: [www.ctc.ca.gov](http://www.ctc.ca.gov)

### DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: \_\_\_\_\_

Revised Declaration of Need for year: \_\_\_\_\_

#### FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL

Name of District or Charter: \_\_\_\_\_ District CDS Code: \_\_\_\_\_

Name of County: \_\_\_\_\_ County CDS Code: \_\_\_\_\_

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board/body of the school district or charter school specified above adopted a declaration at a regularly scheduled public meeting held on \_\_\_/\_\_\_/\_\_\_ certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

► **Enclose a copy of the board agenda item**

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, \_\_\_\_\_.

Submitted by (Superintendent, Board Secretary, or Designee):

\_\_\_\_\_ *Name*    \_\_\_\_\_ *Signature*    \_\_\_\_\_ *Title*

\_\_\_\_\_ *Fax Number*    \_\_\_\_\_ *Telephone Number*    \_\_\_\_\_ *Date*

\_\_\_\_\_ *Mailing Address*

\_\_\_\_\_ *E-Mail Address*

#### FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY, CHARTER SCHOOL OR NONPUBLIC SCHOOL AGENCY

Name of County \_\_\_\_\_ County CDS Code \_\_\_\_\_

Name of State Agency \_\_\_\_\_

Name of NPS/NPA \_\_\_\_\_ County of Location \_\_\_\_\_

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on \_\_\_/\_\_\_/\_\_\_, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, \_\_\_\_\_.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

<i>Name</i>	<i>Signature</i>	<i>Title</i>
<i>Fax Number</i>	<i>Telephone Number</i>	<i>Date</i>
<i>Mailing Address</i>		
<i>E-Mail Address</i>		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

**AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS**

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

<b>Type of Emergency Permit</b>	<b>Estimated Number Needed</b>
CLAD/English Learner Authorization (applicant already holds teaching credential)	_____
Bilingual Authorization (applicant already holds teaching credential)	_____
List target language(s) for bilingual authorization: _____	
Resource Specialist	_____
Teacher Librarian Services	_____

**LIMITED ASSIGNMENT PERMITS**

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	
Single Subject	
Special Education	
TOTAL	

AUTHORIZATION(S) FOR SINGLE SUBJECT LIMITED ASSIGNMENT PERMITS (A separate page may be used if needed)	ESTIMATED NUMBER NEEDED

**EFFORTS TO RECRUIT CERTIFIED PERSONNEL**

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to [www.cde.ca.gov](http://www.cde.ca.gov) for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

**EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL**

Has your agency established a District Intern program? Yes    No

If no, explain. \_\_\_\_\_

Does your agency participate in a Commission-approved college or university internship program? Yes                  No

If yes, how many interns do you expect to have this year? \_\_\_\_\_

If yes, list each college or university with which you participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If no, explain why you do not participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_

## Coversheet

### Recommendation to approve the 23-24 Declaration of Need for Monseñor Oscar Romero Charter School

**Section:** V. Items Scheduled For Action  
**Item:** M. Recommendation to approve the 23-24 Declaration of Need for  
Monseñor Oscar Romero Charter School  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 23-24 MORCS Declaration of Need (cl500) .pdf





The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on \_\_\_/\_\_\_/\_\_\_, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, \_\_\_\_\_.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

<i>Name</i>	<i>Signature</i>	<i>Title</i>
<i>Fax Number</i>	<i>Telephone Number</i>	<i>Date</i>
<i>Mailing Address</i>		
<i>E-Mail Address</i>		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

**AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS**

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

<b>Type of Emergency Permit</b>	<b>Estimated Number Needed</b>
CLAD/English Learner Authorization (applicant already holds teaching credential)	_____
Bilingual Authorization (applicant already holds teaching credential)	_____
List target language(s) for bilingual authorization: _____	
Resource Specialist	_____
Teacher Librarian Services	_____

**LIMITED ASSIGNMENT PERMITS**

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	
Single Subject	
Special Education	
TOTAL	

AUTHORIZATION(S) FOR SINGLE SUBJECT LIMITED ASSIGNMENT PERMITS (A separate page may be used if needed)	ESTIMATED NUMBER NEEDED

**EFFORTS TO RECRUIT CERTIFIED PERSONNEL**

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to [www.cde.ca.gov](http://www.cde.ca.gov) for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

**EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL**

Has your agency established a District Intern program? Yes      No

If no, explain. \_\_\_\_\_

Does your agency participate in a Commission-approved college or university internship program? Yes                  No

If yes, how many interns do you expect to have this year? \_\_\_\_\_

If yes, list each college or university with which you participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If no, explain why you do not participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_

## Coversheet

### Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter High School

**Section:** V. Items Scheduled For Action  
**Item:** N. Recommendation to approve the 23-24 Declaration of Need for Bert Corona Charter High School  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 23-24 BCCHS Declaration of Need (cl500).pdf



State of California  
 Commission on Teacher Credentialing  
 Certification Division  
 1900 Capitol Avenue  
 Sacramento, CA 95811-4213

Email: [credentials@ctc.ca.gov](mailto:credentials@ctc.ca.gov)  
 Website: [www.ctc.ca.gov](http://www.ctc.ca.gov)

## DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: \_\_\_\_\_

Revised Declaration of Need for year: \_\_\_\_\_

### FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL

Name of District or Charter: \_\_\_\_\_ District CDS Code: \_\_\_\_\_

Name of County: \_\_\_\_\_ County CDS Code: \_\_\_\_\_

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board/body of the school district or charter school specified above adopted a declaration at a regularly scheduled public meeting held on \_\_\_/\_\_\_/\_\_\_ certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

► **Enclose a copy of the board agenda item**

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, \_\_\_\_\_.

Submitted by (Superintendent, Board Secretary, or Designee):

\_\_\_\_\_ *Name*    \_\_\_\_\_ *Signature*    \_\_\_\_\_ *Title*

\_\_\_\_\_ *Fax Number*    \_\_\_\_\_ *Telephone Number*    \_\_\_\_\_ *Date*

\_\_\_\_\_ *Mailing Address*

\_\_\_\_\_ *E-Mail Address*

### FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY, CHARTER SCHOOL OR NONPUBLIC SCHOOL AGENCY

Name of County \_\_\_\_\_ County CDS Code \_\_\_\_\_

Name of State Agency \_\_\_\_\_

Name of NPS/NPA \_\_\_\_\_ County of Location \_\_\_\_\_

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on \_\_\_/\_\_\_/\_\_\_, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, \_\_\_\_\_.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

<i>Name</i>	<i>Signature</i>	<i>Title</i>
<i>Fax Number</i>	<i>Telephone Number</i>	<i>Date</i>
<i>Mailing Address</i>		
<i>E-Mail Address</i>		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

**AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS**

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

<b>Type of Emergency Permit</b>	<b>Estimated Number Needed</b>
CLAD/English Learner Authorization (applicant already holds teaching credential)	_____
Bilingual Authorization (applicant already holds teaching credential)	_____
List target language(s) for bilingual authorization: _____	
Resource Specialist	_____
Teacher Librarian Services	_____

**LIMITED ASSIGNMENT PERMITS**

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	
Single Subject	
Special Education	
TOTAL	

AUTHORIZATION(S) FOR SINGLE SUBJECT LIMITED ASSIGNMENT PERMITS (A separate page may be used if needed)	ESTIMATED NUMBER NEEDED

**EFFORTS TO RECRUIT CERTIFIED PERSONNEL**

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to [www.cde.ca.gov](http://www.cde.ca.gov) for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

**EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL**

Has your agency established a District Intern program? Yes    No

If no, explain. \_\_\_\_\_

Does your agency participate in a Commission-approved college or university internship program? Yes                  No

If yes, how many interns do you expect to have this year? \_\_\_\_\_

If yes, list each college or university with which you participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If no, explain why you do not participate in an internship program.

\_\_\_\_\_

\_\_\_\_\_



## Coversheet

### Recommendation to Approve Local Assignment Option EC 44256 (b) for Christina Luc

**Section:** V. Items Scheduled For Action  
**Item:** O. Recommendation to Approve Local Assignment Option EC 44256 (b)  
for Christina Luc  
**Purpose:**  
**Submitted by:**  
**Related Material:** 18. LAO Christina LUC 2023-2024 docx.... (1).pdf



**Local Area Option  
(LAO)**

In accordance with Ed Code (§44258.2) the Board delegates to the Principal/Ex. Dir. the authority to employ the holder of a single subject teaching credential, with his or her consent, to teach classes in grades 6 to 8, inclusive, in a YPICS middle school, if he or she has a minimum of **12 semester units, or six upper division or graduate units**, of coursework at an accredited institution in the subject to which he or she is assigned. And also in accordance with EC §44256(b) the Board delegates to the principal and the Ex. Dir. the authority to employ holder of a multiple subject teaching credential to teach any subject in departmentalized classes to a given class or group of students below grade 9, provided that the teacher has completed at least 12 semester units, or six upper division or graduate units, of coursework at an accredited institution in each subject to be taught. Such assignment shall be with the teacher's consent.

**Local Area Option Transcript checklist for: Christina Luc**

**Credential held:** Multiple Subject Clear (List the Credential Exactly as it appears on the CTCC Website)

**Subject to be added: 7<sup>th</sup> Grade Math**

Course Title	# of units LD or UD/G
University Transcript Review- in HR Employee Records	12 Units
<b>Minimum of 12 LD or 6 UD/G</b>	12 LD

**Subject to be added:**

Course Title	# of units LD or UD/G
<b>Minimum of 12 LD or 6 UD/G</b>	

*Following the board approval, YPICS will seek teacher consent to the 7<sup>th</sup> Grade math assignment*

I, \_\_\_\_\_ consent to this teaching assignment for the 2023-2024 school year.

Signature

Date