Youth Policy Institute Charter Schools (YPICS)

YPICS Regular Board Meeting

Date and Time

Tuesday August 13, 2024 at 6:00 PM PDT

Location

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

The meeting will be held at YPI Charter Schools Learning and Support Center.

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: Invite Link
https://us06web.zoom.us/j/81830780138

Presentations from the Public can only be made at one of the four YPICS locations listed.
YPI Charter Schools
Learning and Support Center
10660 White Oak Avenue, Suite B101
Granada Hills, CA 91344

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

Agenda

		Purpose	Presenter	Time

I. Opening Items   **6:00 PM**

Opening Items

A.	Record Attendance and Guests	Yesenia Zubia	
B.	Call the Meeting to Order	Mary Keipp	
C.	Additions/Corrections to Agenda	Mary Keipp	1 m

II. Communications   **6:01 PM**

A.	Presentations from the Public	FYI	Mary Keipp

END OF STATE OF EMERGENCY AND NEW REMOTE PARTICIPATION RULES - Assembly Bill 2449

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 requirements may be found in the full text of AB2449 (California Legislation Information). All requirements for attendance by the YPICS Board of Trustees are adhered to in accordance with the Ralph M. Brown Act.

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.

	Purpose	Presenter	Time

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 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, info@romerocharter.org. All efforts will be made for reasonable accommodations.

III. Public Hearing   6:01 PM

A. Sufficiency of Instructional Materials - Education   Mary Keipp   10 m
Code Section 60119

The purpose of the hearing is to present information in support of the approval of Board Resolution 2024-01, which attests the sufficiency of textbooks and instructional materials at YPI Charter Schools required by Education Code Section 60119. The yearly review and approval of such a resolution is required by all California public school governing boards.

The Public Hearing will be conducted in English. Persons interest in attending the hearing who have special communication or accommodation needs, or need an interpreter, are encouraged to contact either Ms. Yolanda Fuentes, Assistant Executive Administrator (818) 631-7445, Mr. Daniel Rios, Director of Instruction (818) 834-8505, or Ms. Cynthia Jimenez (213) 413-9600 Every reasonable effort will be made to accommodate these needs. If you have general questions or concerns regarding the Public Hearing, you may contact Ms. Yvette King-Berg, Executive Director of the YPI Charter Schools, at (818) 726-8883.

		Purpose	Presenter	Time
IV.	**Items Scheduled For Action**			**6:11 PM**
A.	Board Resolution #2425-02: Materials Sufficiency for Williams Compliance	Vote	Ena LaVan	3 m
	The administration recommends approval of the Williams Resolution for Instructional Materials Sufficiency.			
B.	Review and Approve FY24-25 English Learner Master Plan	Vote	Ena LaVan	5 m
	The administration recommends the review and approval of the 2024-2025 YPICS EL Master Plan			
C.	Board Resolution #2425-01: MORCS Renewal Petition Submission to LAUSD	Vote	Ena LaVan	15 m
	The administration recommends approval of the Board Resolution for Submission of MORCS Renewal Petition.			
D.	Review and Approve the Updated Fiscal Policies and Procedures	Vote	Irina Castillo	5 m
	The administration recommends review and approval of the proposed changes to the Fiscal Policies and Procedures.			
E.	Review and Approve FY24-25 MORCS Pro Rata Share Payments to LAUSD Automatic Deduction	Vote	Yvette King-Berg	5 m
	The administration recommends the review and approval of the FY24-25 MORCS Pro Rata Share Payments to LAUSD automatic deduction.			
F.	Review and Approval of the FY24-25 BCCHS Prop 39 Alternative Agreement	Vote	Yvette King-Berg	5 m
	The administration recommends the review and approval of the FY24-25 BCCHS Prop 39 Alternative Agreement.			
G.	Review and Approve Contract for Curriculum Associates	Vote	Yvette King-Berg	5 m
	The administration recommends the approval of the Curriculum Associates in the amount of $63,923.42 which is over the spending authority of the Executive Director.			
V.	**Announcements**			**6:54 PM**

		Purpose	Presenter	Time
A.	Closing Announcements	FYI	Yvette King-Berg	2 m
VI.	**Closing Items**			**6:56 PM**
A.	Adjourn Meeting	Vote	Mary Keipp	

Coversheet

Board Resolution #2425-02: Materials Sufficiency for Williams Compliance

Section: IV. Items Scheduled For Action
Item: A. Board Resolution #2425-02: Materials Sufficiency for Williams Compliance
Purpose: Vote
Submitted by:
Related Material: #2425-02 Williams Sufficiency Resolution.pdf
                       24-07-29 YPICS Williams Curriculum Inventory - BCCS and MORCS.pdf
                       24-07-29 YPICS Williams Curriculum Inventory - BCCHS.pdf

Board Resolution #2425-02

RESOLUTION OF THE BOARD OF TRUSTEES OF THE YPI CHARTER SCHOOLS SUFFICIENCY OF INSTRUCTIONAL MATERIALS

WHEREAS, the governing board of the YPI Charter Schools, to comply with the requirements of *Education Code* Section 60119, held a public hearing on August 13, 2024, at 6:00 p.m., which is on or before the eighth week of school (between the first day that students attend school and the end of the eighth week from that day) and which did not take place during or immediately following school hours, and;

WHEREAS, the Board provided notice of the public hearing by posting it in at least three public places within the district stating the time, place, and purpose of the hearing, and;

WHEREAS, the Board encouraged participation by parents/guardians, teachers, and members of the community, and;

WHEREAS, information provided at the public hearing and to the governing board at the public meeting detailed the extent to which textbooks and instructional materials were provided to all students, including English learners, in the YPI Charter Schools, and;

WHEREAS, the definition of "sufficient textbooks or instructional materials" means that each student, including each English learner, has a standards-aligned textbook and/or instructional materials, or both, to use in class and to take home, which may include materials in a digital format, but shall not include photocopied sheets from only a portion of a textbook or instructional materials copied to address a shortage, and;

WHEREAS, the definition of "sufficient textbooks or instructional materials" also means that all students are enrolled in the same course within the YPI Charter Schools have standards-aligned textbooks or instructional materials from the same adoption cycle, and;

WHEREAS, sufficient textbooks and instructional materials were provided to each student, including English learners, that are aligned to the academic content standards and consistent with the cycles and content of the curriculum frameworks in the following subjects and the YPI Charter Schools have provided sufficient textbooks and materials as per the list included with the 8/13/24 Board packet (see attached).

NOW THEREFORE, it is resolved that for the 2024-2025 school year, the YPI Charter Schools has provided each pupil with sufficient textbooks or instructional materials aligned to the academic content standards, consistent with the cycles and content of the curriculum frameworks, and the materials approved to date by the California State Board of Education.

PASSED, APPROVED AND ADOPTED this 13th day of August 2024 by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

Date: 8/13/2024

_____
Mary Keipp, Board Chair

_____
Sandra Mendoza, Board Secretary

Curricular Area	Course Title	Course Number	Texbook Title	ISBN	Publisher	Author	Physical Textbook	Online Curriculum	Notes
Student Leadership	Leadership	2719	n/a	n/a	n/a	n/a	n/a	n/a	teacher created curriculum
Advisory	Advisory	6001	n/a	n/a	n/a	n/a	n/a	n/a	teacher created curriculum
Physical Education	P.E.	9311	n/a	n/a	n/a	n/a	n/a	n/a	teacher created curriculum
English Language Development	English Language Development	4112	Ready Common Core Reading Instruction		Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
English Language Arts	English Support	9103	Ready Common Core Reading Instruction	978-0-7609-8557-1 978-0-7609-8558-8 978-0-7609-8559-5	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
English Language Arts	English-6th	21016	Ready Common Core Reading Instruction	978-0-7609-8557-1	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
English Language Arts	English-7th	21017	Ready Common Core Reading Instruction	978-0-7609-8558-8	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
English Language Arts	English-8th	21018	Ready Common Core Reading Instruction	978-0-7609-8559-5	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
History and Social Studies	Social Studies-6th	27346	TCI History Alive! The Ancient World	https://www.teachtci.com/	TCI	TCI	N	Y	Online Only
History and Social Studies	Social Studies-7th	27347	TCI History Alive! The Medieval World and Beyond	https://www.teachtci.com/	TCI	TCI	N	Y	Online Only
History and Social Studies	History-8th	27348	TCI History Alive! The United States Through Industrialism	https://www.teachtci.com/	TCI	TCI	N	Y	Online Only
History and Social Studies	History Support	9312	TCI History Alive! The Ancient World TCI History Alive! The Medieval World and Beyond TCI History Alive! The United States Through Industrialism	https://www.teachtci.com/	TCI	TCI	N	Y	Online Only
Mathematics	Pre-Algebra	2424	i-Ready Classroom Mathematics	978-7280-1302-2	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
Mathematics	Math-6th	2431	i-Ready Classroom Mathematics	978-7280-1298-8	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
Mathematics	Math-7th	2432	i-Ready Classroom Mathematics	978-7280-1300-8	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
Mathematics	Foundational Math Support	9245	i-Ready Classroom Mathematics	978-7280-1302-2 978-7280-1298-8 978-7280-1300-8	Curriculum Associates		Y	Y	Textbook for each student Online Learning Path
Science	Science Support	9510	Stile Mosa Mack	https://us.stileeducation.com/ https://mosamack.com/	Stile Education Mosa Mack Science	Stile Education Mosa Mack Science	N	Y	Online Only
Science	Science-6th	2652	Stile Mosa Mack	https://us.stileeducation.com/ https://mosamack.com/	Stile Education Mosa Mack Science	Stile Education Mosa Mack Science	N	Y	Online Only
Science	Science-7th	2653	Stile Mosa Mack	https://us.stileeducation.com/ https://mosamack.com/	Stile Education Mosa Mack Science	Stile Education Mosa Mack Science	N	Y	Online Only
Science	Science-8th	2654	Stile Mosa Mack	https://us.stileeducation.com/ https://mosamack.com/	Stile Education Mosa Mack Science	Stile Education Mosa Mack Science	N	Y	Online Only

Curricular Area	Course Title	Course Number	Texbook Title	ISBN	Publisher	Author	Physical Textbook	Online Curriculum	Notes
	AP Spanish Language and Culture	2275	na	n/a	n/a	n/a	n/a	**AP Classroom:** https://apcentral. collegeboard. org/myap/ https://apspanlang. com/ https://cnnespanol. cnn.com/	
	Resource Specialist Program	88	Multiple Novels	n/a	n/a	n/a	n/a		
	CHANGING HEARTS AND MINDS: ENG	2133	Multiple Novels	n/a	n/a	n/a	n/a	Audible.com Achieve3000.com Newsela.com Paperrater.com CommonLit.com	
	AP English Language and Comp	2170	Multiple Novels	n/a	n/a	n/a	n/a	"Audible.com Achieve3000.com Newsela.com Paperrater.com CommonLit.com" **AP Classroom:** https://apcentral. collegeboard. org/myap/	
	Spanish (1 AND 2)	2206	Avancemos! SPANISH 1	978-0-618-76598-0	Houghton Mifflin Harcourt Publishing Company	Houghton Mifflin Harcourt Publishing Company	Y	duolingo.com studyspanish.com	
	Spanish 2	2225	Avancemos! Spanish 2	978-01-544-86122-0	Houghton Mifflin Harcourt Publishing Company	Houghton Mifflin Harcourt Publishing Company	Y	duolingo.com studyspanish.com	
	HS P.E.	2514	n/a	n/a	n/a	n/a	n/a		
	Leadership	2719	n/a	n/a	n/a	n/a	n/a	n/a	
	Yearbook	2801	n/a	n/a	n/a	n/a	n/a	n/a	
	HS Instructional support	3020	n/a	n/a	n/a	n/a	n/a	n/a	
	Community Service	4902	n/a	n/a	n/a	n/a	n/a	n/a	
	Visual Arts 2	5729	n/a	n/a	n/a	n/a	n/a	**Google (Classroom, Docs, Sheets, Slides, Meet, Drive, Translate) Adobe Cloud (Photoshop, Illustrator, Lightroom, Animate, Premiere, After Effects, Audition) Garage Band, Tinkercad, Figma Mote**	
	Visual and Media Arts III	5737	n/a	n/a	n/a	n/a	n/a	**Google (Classroom, Docs, Sheets, Slides, Meet, Drive, Translate) Adobe Cloud (Photoshop, Illustrator, Lightroom, Animate, Premiere, After Effects, Audition) Garage Band, Tinkercad, Figma Mote**	
	Advisory	6001	n/a	n/a	n/a	n/a	n/a	n/a	
	Teacher Prep	6021	n/a	n/a	n/a	n/a	n/a	n/a	
	Teacher Assistant	6022	n/a	n/a	n/a	n/a	n/a	n/a	
	Health 11	1530400							
	Junior Seminar	1100	n/a	n/a	n/a	n/a	n/a	n/a	
	AP Environmental Science	2674	Environmental Science for the AP Course	IBSN-13: 978-1-319-11329-2. IBSN-10: 1-319-11329-X	Bedford, Freeman & Worth High School Publisher	Andrew Friedland amd Rick Relyea	Y	**PhET:** https://phet. colorado.edu/en/ **CK12 Flexbook for Chemistry:** https://flexbooks.ck12. org/cbook/ck-12-chemistry-flexbook-2.0 **Data Classroom:** https://dataclassroom. com/en **Gizmos:** https://gizmos. explorelearning. com/ **AP Classroom:** https://apcentral. collegeboard. org/myap/	

Curricular Area	Course Title	Course Number	Texbook Title	ISBN	Publisher	Author	Physical Textbook	Online Curriculum	Notes
	AP Biology	2670	Priciples of Life	978-1-4641-0947-8	Sinauer Macmillan	David M. Hillis, David Sadava, Richard W. Hill, and Mary V. Price	Y	**PhET** **https://phet.colorado.edu/en/** **Gizmos** **https://gizmos.explorelearning.com/** **AP Classroom** **https://apcentral.collegeboard.org/myap/** **NOVA Labs** **https://www.pbs.org/wgbh/nova/labs//lab/evolution/research#/chooser**	
	Found in Visual & Media Arts	2820		n/a	n/a	n/a	n/a	**Google (Classroom, Docs, Sheets, Slides, Meet, Drive, Translate)** **Adobe Cloud (Photoshop, Illustrator, Lightroom, Animate, Premiere, After Effects, Audition)** **Garage Band, Tinkercad, Figma Mote**	
	Language Takes the Stage: ENG	2130	Multiple Novels	n/a	n/a	n/a	n/a	**Short Stories for HS Students** **https://americanliterature.com/high-school-short-stories** **StudySync ELA** **https://www.studysync.com/products/ela**	
	Get Reel: English through Your	2131	Multiple Novels	n/a	n/a	n/a	n/a	**Short Stories for HS Students** **https://americanliterature.com/high-school-short-stories** **StudySync ELA** **https://www.studysync.com/products/ela**	
	DESIGNINGTHEAMERICANDREAM ENG	2132	Multiple Novels	n/a	n/a	n/a	n/a	Audible.com Achieve3000.com Newsela.com Paperrater.com CommonLit.com	
	U.S. History and Public Health	2709	History Alive! Pursuing American Ideals	978-1-934534-88-5	Teachers' Curriculum Institute	Diane Hart	Y	Thinking Nation: https://www.thinkingnation.org/	
	World History By Design	2711	History Alive! World Connections	978-1-58371-948-0	Teachers' Curriculum Institute	David Fausulo, Brent Goffa adn David Holford	Y	Thinking Nation: https://www.thinkingnation.org/	
	Algebra 2 for the 21st Century	2404	Algebra 2 Common Core	IBSN-13: 978-0-13-328116-3. IBSN-10: 0-13-328116-7	Pearson Education Inc.	Randall I. Charles, Baisa Hall, Dan Kennedy, Allan E. Bellman, Sadie Chavis Bragg, Willian G. Handlin, Stuart J. Murphy and Grant Wiggins	Y	**Khan Academy** **https://www.khanacademy.org/** **IXL Learning** **https://www.ixl.com/** **Desmos** **https://www.desmos.com/** **DeltaMath** **https://www.deltamath.com/**	
	Geometry + Computer Vis	2439	Geometry Common Core	IBSN-13: 978-0-13-328115-6. BSN-10: 0-13-328115-9	Pearson Education Inc.	Randall I. Charles, Baisa Hall, Dan Kennedy, Laurie E. Bass, Art Johnson, Stuart J. Murphy and Grant Wiggins	Y	**Khan Academy** **https://www.khanacademy.org/** **IXL Learning** **https://www.ixl.com/** **Desmos** **https://www.desmos.com/** **DeltaMath** **https://www.deltamath.com/**	
	Pre-Calculus	2444					Y	**Khan Academy** **https://www.khanacademy.org/** **IXL Learning** **https://www.ixl.com/** **Desmos** **https://www.desmos.com/** **DeltaMath** **https://www.deltamath.com/**	
	Da Vinci Algebra 1 - Math	2446	Algebra I Common Core	IBSN-13: 978-0-13-318548-5 IBSN-10: 0-13-318548-6	Pearson Education Inc.	Randall I. Charles, Baisa Hall, Dan Kennedy, Allan E. Bellman, Sadie Chavis Bragg, Willian G. Handlin, Stuart J. Murphy and Grant Wiggins	Y	**Khan Academy** **https://www.khanacademy.org/** **IXL Learning** **https://www.ixl.com/** **Desmos** **https://www.desmos.com/** **DeltaMath** **https://www.deltamath.com/**	

Curricular Area	Course Title	Course Number	Texbook Title	ISBN	Publisher	Author	Physical Textbook	Online Curriculum	Notes
	Biology and Community Health	2603	Biology for NGSS	978-1-927173-84-8	Biozone International Ltd	Tracey Greenwood, Lissa BAinbridge-Smith, Kent Pryor, and Richard Allan	Y	**PhET** https://phet.colorado.edu/en/ **Gizmos** https://gizmos.explorelearning.com/ **NOVA Labs** https://www.pbs.org/wgbh/nova/labs//lab/evolution/research#/chooser	
	CHEMISTRY AND ENVIRONMENTAL EN	2607	Chemistry Matter and Change	978-0-07-896405-3	The McGraw-Hill Companies, Inc.	Thandi Buthelezi, Lurel Dingrando, Nicholas Hainen, Cheryl Wistram and Dinah Zike	Y	**PhET:** https://phet.colorado.edu/en/ **CK12 Flexbook for Chemistry:** https://flexbooks.ck12.org/cbook/ck-12-chemistry-flexbook-2.0 **Data Classroom:** https://dataclassroom.com/en **Gizmos:** https://gizmos.explorelearning.com/	
	US Government		American Government	IBSN-13: 978--13-324082-5	Pearson Education Inc.	William A. McClenaghan	Y	Thinking Nation: https://www.thinkingnation.org/	
	Probability and Statistics		Elementary Statistics Picturing the Wolrd	IBSN-13: 978-0-321-91121-6	Pearson Education Inc.	Ron Larson and Betsy Faraber			
The definition of instructional materials is in Education Code Section 60010 (h). This law states "'Instructional materials' means all materials that are designed for use by pupils and their teachers as a learning resource and help pupils to acquire facts, skills, or opinions or to develop cognitive processes. Instructional materials may be printed or non-printed, and may include textbooks, technology-based materials, other educational materials, and tests."									

What are "technology-based materials"?

The definition of technology-based materials is in Eduation Code Section 60010(m) as follows:

(1) "Technology-based materials" means basic or supplemental instructional materials that are designed for use by pupils and teachers as learning resources and that require the availability of electronic equipment in order to be used as a learning resource. Technology-based materials include, but are not limited to, software programs, video disks, compact disks, optical disks, video and audiotapes, lesson plans, and databases.

(2) Technology-based materials also includes the electronic equipment required to make use of those materials used by pupils and teachers as a learning resource, including, but not limited to, laptop computers and devices that provide internet access.

Must LEAs use only state-adopted instructional materials?

No. EC Section 60210 states the following:

"(a) Notwithstanding any other law, a local educational agency may use instructional materials that are aligned with the academic content standards adopted pursuant to Section 60605 or 60605.8, including instructional materials that have not been adopted by the state board pursuant to Section 60200.

(b) Instructional materials for mathematics that are aligned to common core academic content standards developed by the Common Core State Standards Initiative consortium pursuant to Section 60605.7 shall be deemed to be aligned to the content standards adopted pursuant to Section 60605 or 60605.8 for purposes of Section 60119.

(c) If a local educational agency chooses to use instructional materials that have not been adopted by the state board, the local educational agency shall ensure that a majority of the participants of any review process conducted by the local educational agency are classroom teachers who are assigned to the subject area or grade level of the materials."

Coversheet

Review and Approve FY24-25 English Learner Master Plan

Section: IV. Items Scheduled For Action
Item: B. Review and Approve FY24-25 English Learner Master Plan
Purpose: Vote
Submitted by:
Related Material: 24-08-08 DRAFT 24-25 YPICS English Learner Master Plan.pdf

English Learner Master Plan
2024-25

(DRAFT FOR REVIEW)

2024-25 ENGLISH LANGUAGE LEARNER MASTER PLAN

All YPICS Charter School's English Language Development (ELD) program will target students who are struggling with the development of their English language skills. Through the ELD program, this includes:

- Ongoing measurement and monitoring of each English Learner student's progress toward English language proficiency,
- Use of a schoolwide acceleration strategies to assist ELL students.
- Ongoing professional development in the area of sheltered instruction for all subject area teachers
- Opportunities for ELD level 1 and 2 students to receive additional accelerated instructional support after school.
- Use of online platforms as tools to support administration and classroom teachers with targeted data analytics to support English Learners and digital workflow tools for our EL program. These platform tools allow our administrators and teachers to monitor, intervene, collaborate, and report on the academic and language success of our ELs. Additionally, they will enable all of our Long-Term English Learners (LTEL) and Reclassified Fluent English Proficient (RFEP) students to be qualitatively and quantitatively monitored as well as streamline our reclassification and parent letter process to be more user-friendly and inclusive to our EL teams and families.

PURPOSE OF DOCUMENT AND INTRODUCTION

As we continue to grapple with the lasting challenges created by the pandemic, our commitment to the acceleration students and particularly English Learners (EL) remains unflagging.

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.

YPICS believes that every student brings assets that enrich our classrooms and our school community. In order to ensure each student's success and create a shared understanding for programming and instruction, the YPICS Charter School ("Charter School") will provide guidance, resources, training and support to teachers, staff and parents to build an equitable, rigorous learning environment for our English Learner (EL) students.

YPICS Charter Schools must be engaged actively in assessing and analyzing student performance, program effectiveness and instructional practices. Implementing research-based structures that support student achievement for ELs is essential, as our aspiration for our students is to be college-/career-ready.

Included in this revised English Learner Master Plan is the use of the following supporting two legislative actions addressing the needs of English Learners. In July 2017, the California State Department of Education adopted a historic new English learner education policy entitled the English Learner Roadmap. This policy recognizes English learners as a system-wide responsibility, a need to provide EL students with a 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 outlined at www.cde.ca.gov/sp/el/rm/ :

1. 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.

2. 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.

3. 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.

4. 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.

We will achieve this vision by:

1. Principle One: Assets-Oriented and Needs Responsive Schools
   - Acknowledging that all students, no matter language proficiency, come with skills, knowledge, and experiences that can help them be academically successful and enrich the school culture as they pursue the goal of becoming English Proficient;
   - Providing ELs opportunities to learn language skills in two or more languages through rigorous instruction to ensure that our students graduate bilingual and biliterate;
   - Valuing parents as partners, capitalizing on the language, skills, culture and experiences they bring to the school community;
   - Ensuring all school staff (school leaders, teachers and staff) feel a sense of ownership and urgency to serve the needs of ELs.

2. Principle Two: Intellectual Quality of Instruction and Meaningful Access
   - Ensuring that all schools have effective English Language Development (ELD) courses to meet the needs of the diverse proficiency levels of ELs;
   - Verifying that all students are placed in the appropriate ELD course based on year and proficiency level;
   - Developing instructional programs and professional development to ensure ELs are engaged in rigorous, intellectually rich and challenging content;
   - Empowering all teachers as Integrated ELD teachers through professional development and collaboration.

3. Principle Three: System Conditions that Support Effectiveness
   - Providing schools with course guidance and sequence structures;
   - Using data and providing teachers with resources to analyze data in order to accurately monitor, place and support ELs throughout their schooling.

4. Principle Four: Alignment and Articulation Within and Across Systems
   - Support implementing the California English Language Development Standards (CA ELD Standards) through the English Language Arts/English Language Development Framework for California Public Schools (ELA/ELD Framework) and the English Language Proficiency Assessments for California (ELPAC);
   - Implementing the EL Master Plan to ensure it is a helpful guide for providing effective supports and services for ELs;
   - Collaborating with the Special Education Department to ensure that ELD goals for students with Individualized Education Plans (IEPs) who are dually-identified (EL and SWD—students with disabilities) prioritize language needs and appropriate support is provided.

This document builds on YPICS 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.

DOCUMENT OVERVIEW

This document is divided into 7 chapters:

- Chapter 1: Identification and Assessment
- Chapter 2: Instructional Program
- Chapter 3: Reclassification Criteria and Exiting
- Chapter 4: Staffing English Learner Programs and Teams
- Chapter 5: Professional Development for All Teachers Who Work with English Learners
- Chapter 6: Parent Engagement
- Chapter 7: Program Evaluation

CHAPTER 1: IDENTIFICATION & ASSESSMENT

IDENTIFICATION PROCESS AND ASSESSMENT OVERVIEW

Proper identification of ELs helps ensure that the school's English language development program is designed to meet the needs of its students. The following procedures are designed to ensure that the student receives an appropriate and effective education.

STAGE 1 – Identification of Students Whose Home Language Is Other Than English (Initial)

A Home Language Survey (HLS) must be completed for each student; it should be provided in English and the language most frequently spoken in the local community (such as Spanish). Parents complete a Home Language Survey at time of initial enrollment in a California school (5 CCR Section 11518.5[a]). This survey consists of four questions pertaining to the home language of the family. As standard procedure, this form is to be included in the enrollment packet and all four questions must be answered.

The school must ensure that ALL students have a completed Home Language Survey on file (including monolingual English speakers). If any of the four questions in the Home Language Survey indicates the use of a language other than English by the student or in the home, the student must be assessed for language proficiency (EC §§ 313, 60810). After the completion of On-line Registration (OLR) process, new student registration is verified individually (student by student) through CALPADS and the Student English Language Acquisition (SELA) status is added into Infinite Campus. New students at the beginning of the year are expected to be enrolled mid-June, the process for adding SELA status takes 2 weeks from the date of enrollment.

- Students enrolled after the initial enrollment window into Infinite Campus will have SELA statuses added by mid-July.
- Students enrolled throughout the school year into Infinite Campus will have SELA status added 1-2 business days.
- Updates in Infinite Campus will be made on the Friday of each week until all SELA statuses have been found.

Students that do not have a SELA status will be given a 'to be determined' (TBD) status. A list of TBD students, along with Initial ELPAC Assessment Parent Notification Letters will be placed in the student's English Language Folder (ELF). Schools must then send home the parent letter and administer the Initial ELPAC within 30 days of initial enrollment (5 CCR Section 11518.5[c]).

STAGE 2 – English Language Assessments

The English Language Proficiency Assessments for California (ELPAC) is California's assessment system that is used to determine the English language proficiency (ELP) of students whose primary language is not English. The ELPAC is

aligned with the 2012 California English Language Development Standards and assesses four domains: Listening, Speaking, Reading, and Writing.

English Language Assessments for California (ELPAC) is the assessment used to determine how well students speak, listen, read and write in English when it is not their primary language. There are four forms of the assessment each aligned to a specific need of the individual student:

Initial ELPAC: The Initial ELPAC is used to identify students as being either an English learner or fluent English proficient. It is administered only once during a student's time in the California public school system, based on the results of the home language survey. The locally scored Initial ELPAC is the official score. It is used to identify students as either an English Learner (EL) who needs support to learn English or as proficient in English (EC Section 313; 5 CCR Section 11518.5[d]). Schools have a 30-day window upon enrollment within which to administer the assessment.*

Initial Alternate ELPAC: This alternative form of the Initial ELPAC test is designed for students with the most significant cognitive disabilities who are potential English learners (ELs) whose individualized education program (IEP) team has determined that they are eligible for an alternate assessment.

Summative ELPAC: an annual summative assessment given every spring to measure an EL's progress and determine their English language proficiency until reclassified as proficient in English (EC sections 313, 60810; 5 CCR sections 11306, 11518.15[a])

Summative Alternate ELPAC: This test is designed for students with the most significant cognitive disabilities who are English learners (ELs) whose individualized education program (IEP) team has determined that they are eligible for an alternate assessment.

*The California Department of Education (CDE) is requiring schools to administer the Initial ELPAC within 30 days of the first day of school to students enrolled during the academic school year. Mandatory, state-sponsored Initial ELPAC administration and scoring trainings are accessible via the Moodle Training Site. The LSC will annually provide optional office hours for the Initial ELPAC in August.

The chart below provides an overview of the ELPAC, including the four domains assessed:

	Initial ELPAC	Initial Alternate ELPAC	Summative ELPAC	Summative Alternate ELPAC
Why is the ELPAC given?	The purpose of the Initial ELPAC is to determine the English proficiency of students entering California schools for the first time. Identifying students who need help learning in English is important so students get the extra help they need to do well in school while receiving instruction in all school subjects.	The Initial Alternate ELPAC was developed to ensure that all students are able to participate in an assessment that is an accurate measure of a student's English language proficiency (ELP). The Initial Alternate ELPAC will provide information to determine a student's initial classification as an EL student or as fluent English proficient (FEP).	The purpose of the Summative ELPAC is to measure progress toward English language proficiency, to inform EL programs and services, and to help determine if a student is ready to be reclassified. This is important when ensuring that students continue to receive the supports they need to succeed in school.	The Summative Alternate ELPAC was developed to ensure that all students are able to participate in an assessment that is an accurate measure of a student's English language proficiency (ELP). The Summative Alternate ELPAC will provide information on an EL student's annual progress toward ELP and support decisions for students to be reclassified as fluent English proficient (RFEP).
Who takes the ELPAC?	The Initial ELPAC is given to students in kindergarten (K), including transitional kindergarten, through grade twelve whose primary language is not English to determine their ELP status. Students with disabilities who cannot take one or more domains of the ELPAC with allowed universal tools, designated supports, or accommodations are eligible for a domain exemption(s). Students with the most significant cognitive disabilities who cannot access the ELPAC with approved accessibility resources are eligible to take an alternate assessment, as noted in their individualized education program.	The Initial Alternate ELPAC will be administered to all eligible students with the most significant cognitive disabilities in grades K through grade twelve, including students through twenty-one years of age, whose primary language is a language other than English and are determined eligible for alternate assessments by an IEP team.	The Summative ELPAC is given only to students in kindergarten (K) including transitional kindergarten through grade twelve who have been identified as EL students. These students will take the assessment every year until they are reclassified to fluent English proficient. Students with disabilities whose disability precludes them from accessing a particular domain (e.g., student is blind and is not yet braille literate) may be excluded from one domain within a composite, as noted in their individualized education program.	The Summative Alternate ELPAC will be administered to all eligible students in grades K–12, including students through twenty-one years of age, whose primary language is a language other than English and are determined eligible for alternate assessments by an IEP team. Local educational agencies are required to administer the Summative Alternate ELPAC annually to eligible students identified as EL students until they are reclassified.

	Initial ELPAC	Initial Alternate ELPAC	Summative ELPAC	Summative Alternate ELPAC
How is the ELPAC given?	The Initial ELPAC is a computer-based test except writing, which is a paper pencil test. This test is administered in six grade spans—K, grade one, grade two, grades three through five, grades six through eight, and grades nine through twelve. In K and grade one, all domains are administered one-on-one. In grades two through twelve, the test is administered in groups except for speaking, which is assessed one-on-one. Testing times will vary depending upon the grade level, domain, and individual student.	This is a computer-based assessment administered one-on-one in person by a trained test examiner who is familiar with the student and their needs. The student will interact with a test examiner who will collect and record responses, although some students may navigate the test independently, depending on their abilities. The Initial Alternate ELPAC is untimed; test items will be administered to the student over the course of one or more testing sessions, as needed, for the student to complete the assessment.	This is a computer-based assessment for all domains for grades three through twelve, and for all domains for K through grade two, except writing which is a paper-pencil test. In K through grade two, all domains are administered individually, except grade two writing which may be administered in small groups. In grades three through twelve, the test is administered in groups exclusive of speaking, which is assessed one-on-one. Testing times will vary depending upon the grade level, domain, and individual student.	This is a computer-based assessment administered one-on-one by a trained test examiner who is, whenever possible, familiar with the student and their needs. The student will interact with a test examiner who will collect and record responses, although some students may navigate the test independently, depending on their abilities. Testing times will vary depending upon the grade level and individual student.
What is assessed on the ELPAC?	*Speaking:* Using oral language appropriately in academic and social interactions *Listening*: Understanding the oral language of the teacher, extracting information and following the instructional discourse *Reading:* Comprehending and interpreting text at age and grade appropriate levels *Writing:* Producing written text with content and format in classroom assignments at age and grade appropriate levels			
When is the ELPAC given?	The Initial ELPAC administration window is open from July 1 through June 30. students are given the initial assessment within 30 days of enrollment	The Initial Alternate ELPAC administration window is from July 1 through June 30. Note that eligible students will only take the Initial Alternate ELPAC once, upon first enrolling in a California public school.	The Summative ELPAC administration window is open from February 1 through May 31.	The Summative Alternate ELPAC administration window is open from February 1 through May 31.

Source: California Department of Education, *English Language Proficiency Assessments for California (ELPAC) – Resources and Communication Materials* website
https://www.cde.ca.gov/ta/tg/ep/ accessed September 1, 2023.

Students will receive an overall scale score and performance level consisting of oral language skills (speaking, listening) and written language skills (reading, writing).

ELPAC Level	Descriptor	Characteristics of this ELPAC Level
4	"Well-developed"	• They can usually use English to learn new things in school and to interact in social situations. • They may occasionally need help using English.
3	"Moderately developed"	• They can sometimes use English to learn new things in school and to interact in social situations. • They may need help using English to communicate on less-familiar school topics and in less-familiar social situations.
2	"Somewhat developed"	• They usually need help using English to learn new things at school and to interact in social situations. • They can often use English for simple communication.
1	Beginning stage	• They usually need substantial help using English to learn new things at school and to interact in social situations. • They may know some English words and phrases.

The following table describes how the ELPAC levels are aligned to ELD Standards Proficiency Levels:

ELPAC Levels	Level 1	Level 2	Level 3	Level 4
ELD Standards Proficiency Levels	"Emerging" Requires substantial linguistic support	"Expanding" Requires moderate linguistic support		"Bridging" Requires light linguistic support

Summative ELPAC Identification Process
In order to ensure that all students identified as English Learners (EL) take the Summative ELPAC the school will follow the following procedure:
- Coordinator/Director of Instruction receives rosters of test-eligible schools from ELPAC TOMS
- If a student enrolls any time throughout the school year and is TBD, they'll take the Initial EPLAC and their ELAS will be updated based on the test
- CALPADS is updated by CALPADS Coordinator/Director (this makes the student eligible for the Summative ELPAC if they are an EL)
- Initial ELPAC results are updated on a per monthly basis in order to ensure that CALPADS is updated
- Test completion is tracked in the Completion Status System (same one used for all CAASPP tests)

(DRAFT FOR REVIEW)

- Coordinator/Director of Instruction and or Designee(s) receive communications via TOMS during the school year on ELPAC-related information

Language Proficiency Assessment for students with Moderate to Severe Disabilities

Summative Alternate ELPAC is an alternative assessment used to determine language proficiency for ELs with moderate to severe disabilities on the alternate curriculum. The Alternate ELPAC assesses in all areas requested by the California Department of Education (CDE): listening, speaking, reading and writing. The information gathered from the Alternate ELPAC can be used to determine whether the student is an EL or a student with disabilities in language and cognition, across languages (5 CCR Section 11518.25 and 11518.30).

IEP teams uses the [Alternate Assessment Decision Confirmation Worksheet](#) to determine if the Alternate ELPAC is appropriate.

The individualized education program (IEP) team determines an individual student's eligibility to participate in an alternate assessment. To guide and support IEP teams in determining whether a student is most appropriately assessed with an alternate assessment, the California Department of Education (CDE) developed this Alternate Assessment Decision-Making Tool after consulting with its Assessment Development and Administration Division and Special Education Division.

Any year during which a student could participate in the state's general California Assessment of Student Performance and Progress (CAASPP) and English Language Proficiency Assessments for California (ELPAC), and prior to the student participating in California Alternate Assessments (CAAs) or the Alternate ELPAC, the IEP team should complete the process of using this tool. This tool is divided into four parts, Part A through Part D. IEP teams should work though the document, starting with Part A. At the end of each part, the team should review whether the student meets the criteria for alternate assessment. After reviewing the information, if a student does not meet the eligibility criteria, the student may not participate in the CAAs for English language arts/ literacy (ELA), mathematics, and science or the Alternate ELPAC. When using this tool to document the IEP team's decision, all members of the IEP team should sign the form. Please attach this completed form to the student's IEP. Throughout the tool, IEP teams must review multiple sources of information, including the student's IEP and other data, such as results from formative assessments, evidence-based interventions, assistive technology assessment, and the student's cumulative folder documenting supports and services.

STAGE 3 – Parent Notification
Prior to placing a student in an ELD program, the school must inform parents of their child's language classification and eligibility for placement in the ELD program. The school's Coordinator/Director of Instruction and ELP teacher, with the support of the school office staff, will provide the following in writing:

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1. **Assessment Notification:** The school will notify parents/guardians of their child's results on the state's English language proficiency assessment within 30 calendar days of receipt (EC Section 313; 5 CCR Section 11518.5[d]).
2. **Placement Notification:** At the beginning of each school year, parents/guardians will be informed of the placement of their child in an ELD program.

Parent notification must be communicated in a language that can be understood by them within the first 30 days of school. If the student enrolls after the first 30 days of school, parent notification must be completed within two weeks of enrollment. A detailed overview of this process is below:
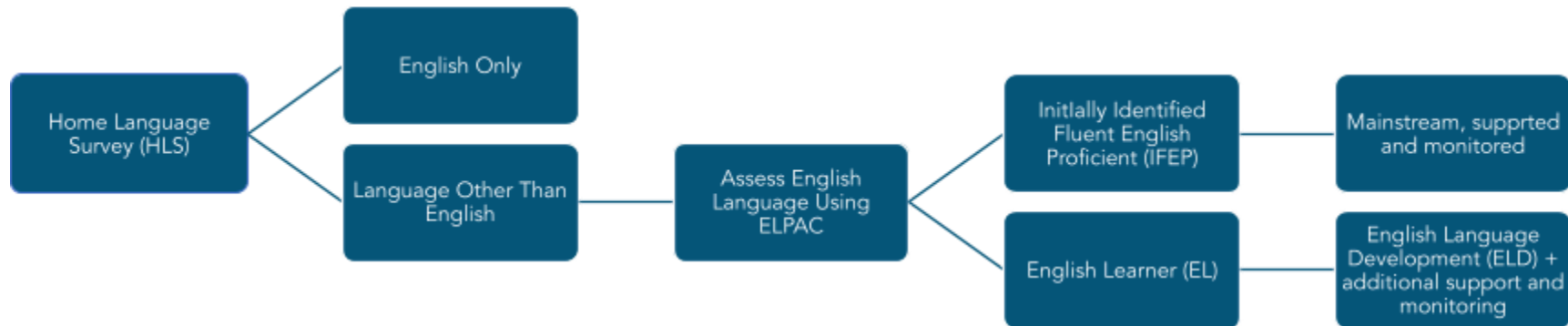
Maintenance of Records

In accordance with the California Education Code, the cumulative record is a legal document that is to be maintained in perpetuity. State and federal mandates require LEAs to maintain documentation for ELs within each student's cumulative record. The LEA has adopted the use of the English Learner Electronic Profile (ELEP) to maintain a digest and monitor

required EL documents. All data platforms must be maintained for every EL as part of the student's cumulative record and must be made available for review during authorizer oversight, state, and federal compliance reviews.

EL items to be included in Student's Cumulative Record

Initial English Language Assessment:

- The Initial English language proficiency assessment. This document indicates the initial assessment results. If an initial assessment was administered prior to July 2017, the student may have a label that reflects results from Initial CELDT.

Signed Parental Notifications:

- Initial Notification of Enrollment in English Learner Program
- Initial Notification of ELPAC assessment
- Initial Parent Notification of Language Test Results and Confirmation of Program Placement
- Annual Assessment Parent Notification
- Annual Assessment Results and Program Placement for English Learners parent notification (Elementary or Secondary letters)

Language Assessments:

- Initial English language proficiency assessment results (Initial ELPAC Report).
- Primary language assessment (if applicable) or foreign language transcripts (secondary).
- Annual ELPAC student Proficiency Level Report for each year the ELPAC was administered.

Reclassification, if applicable:

- Notification of Reclassification letter with parent signature
- Reclassification Monitoring Reports

Opt-Out, if applicable:

- Parental Opt-Out of Program Request Form (a request for placement Mainstream Program with no ELD course).

The Coordinator/Director of Instruction is responsible for the ELEP, for timeliness, content and accuracy. They must ensure that all documents are current and accurate. [CCR, Sec. 433(a)].

When EL documentation is missing from ELEP or the cumulative record, it is the responsibility of the Coordinator/Director of Instruction to make a reasonable attempt to obtain the documents. The procedures for making a reasonable attempt are:

1. Make a copy of the original document sent home to keep on file.
2. Resend a copy of the document if the original is not returned within a reasonable amount of time (5-7 days). Annotate the document by indicating the original date sent.

3. Contact the parent/guardian by telephone as a reminder and request return of the document. If contact by telephone is not successful, annotate the document by indicating the date and time the attempt was made. File the annotated document in the student's EL Folder.

CHAPTER 2: INSTRUCTIONAL PROGRAM

INSTRUCTIONAL PROGRAM OVERVIEW

To effectively meet English Learners' academic needs, the school will adopt a schoolwide instructional program that provides depth and adequate time for English language acquisition, allows students to access the curriculum, promotes high expectations, and increases interactions between ELs, teachers and peers. English language development is not something that happens in isolation. It is a shared responsibility throughout the school.

Understanding English Language Learners

ELs are a diverse group of students, encompassing everyone from newly arrived "newcomer" students to Long-Term English Learners (LTEL). Students arriving from foreign countries during adolescence vary widely in educational experience, home language literacy and acculturation to life in the United States. In addition, many of our students live in homes with challenging socioeconomic status. The more information the school acquires, the better it is able to help students be successful.

Immigrants bring a reservoir of content knowledge from their previous school. To best support students, the Coordinator/Director of Instruction, with the support of the School Program Coordinator and/or Student Records Specialist, will:

- Request and utilize transcripts from previous academic institutions to enroll students in their courses
- Interview students and parents (with the assistance of a translator) about their prior educational experiences, and consider the students' strengths when selecting their courses

ELs who have attended many different schools in and out of the United States may have experienced a variety of program models. Many ELs may also have experienced interrupted schooling for a variety of reasons and tend to be more at risk of dropping out, so it is important to identify these students and provide the appropriate support. Coordinator/Director of Instruction and Program Coordinator, will engage in the following best practices:

- Communicate with parents early and often to help them understand what school programs the school will provide and how they may be different or similar to what their children received in the past
- For ELs who have moved through many districts and programs, provide placement assessments (if available) in English Language Arts (ELA), math and foreign language (i.e., Spanish) to determine the appropriate level of placement

There are four types of ELs enrolled in YPICS schools at the secondary level. These include:

1. Newcomers with formal education

2. Newcomers with limited formal education
3. English Learners on-track that enrolled less than 4 years and are meeting minimum progress expectations.
4. Long-Term English Learners (LTELs) with 6 or more years in any U.S. English Learner program

Newcomers with Formal Schooling

Characteristics of these students may include:

- Recent arrival in the United States (3 years or less)
- Little or no English fluency
- Adequate formal schooling in native country, at grade level or beyond in primary language
- Potential candidate for Seal of Biliteracy, if English proficiency is met
- Often highly motivated, may seek additional support and resources
- Easily transfers academic concepts with language support
- Standard "Not Met" on the California Assessment of student Performance and Progress (CAASPP)
- May not meet grade-level standards in all subject areas due to language proficiency

These students face the dual challenge of acquiring English quickly as well as mastering state content and performance standards, in order to meet college preparatory/A-G requirements and complete all high school graduation requirements. These students are in need of an accelerated ELD program that is rigorous, yet flexible, and allows students to progress in their acquisition of English at their own pace. Opportunities to move between levels must be frequent (at the semester, if appropriate).

For High School English Learners: Attention to content instruction is also important to ensure that students successfully complete the high school course of study. In some cases, they require an additional year of high school or the opportunity to transition to other programs, such as an adult school. In all cases, it is important that these students are counseled correctly having transcripts analyzed for potential courses that may satisfy A-G requirements, provided supports for the challenges ahead of them, leveraging the assets they bring from past experience, and provided a personalized learning plan that enables them to successfully complete high school and post-secondary studies.

Newcomers with Limited Formal Schooling

Characteristics of these students may include:

- Recent arrival in the United States (3 years or less)
- Schooling in native country limited or interrupted
- Minimal literacy skills in primary language
- Require additional time to become accustomed to school routines and educational expectations in the United States
- Strong survival and life skills

- Intuitive learners and cooperative workers
- Often refugees who may have experienced trauma or witnessed disturbing events must also have attention to their social-emotional development as well
- May require additional supports for foundational literacy skills

ELs who enter at the secondary level with limited formal schooling face unique challenges and require additional supports to complete all high school graduation requirements. These students frequently have gaps in their schooling that often result in a need for substantial support of foundational literacy skills. An EL with limited formal schooling who enrolls for the first time at the high school level needs additional time in order to develop English proficiency and complete all requirements for high school graduation. Careful counseling when scheduling courses to ensure support and gradual increase in rigor and development of a long-range learning plan are required. For these students in particular, an additional year of high school or the opportunity to transition to other programs, such as an adult school, is strongly recommended.

Long-Term English Learners (LTELs)

Characteristics of these students include:
- Enrolled in U.S. schools for 6 or more years without reclassifying to fluent English proficient status
- High-functioning social language (strong basic interpersonal communication skills in English)
- Limited academic language; vocabulary is general and imprecise
- Read and write below grade level
- Struggles academically (e.g., has low grade-point average, scores "Not Met" or "Nearly Met" in ELA on the CAASPP)

LTELs often demonstrate strong oral skills in casual, conversational English and home language, but lack academic language and vocabulary. In order to engage with the demands of the secondary school curriculum, they need explicit instruction in academic uses of English with a focus on comprehension, vocabulary development, and the advanced grammatical structures needed to produce grade-level work.

Dually-Identified English Learners Who Also Have an IEP/504 Plan

Characteristics of these students include:
- English Learner
- Current qualifying disability, including but not limited to Learning Disability, Other Health Impaired, Speech Impairment, Emotional Disturbance, Autism, etc.
- May or may not be a Long-Term English Learner (LTEL)

ELs who are dually identified would benefit from additional educational services, supports, and accommodations in order to make progress towards becoming English proficient and meeting grade-level standards. An EL student with an IEP must have appropriate linguistic goals that are aligned to the educational needs of the student. EL students with IEPs may need accommodations for assignments and assessments, depending on their IEP/504 plan.

Instructional Program Descriptions for English Learners (6-12)

The California Department of Education defines English Language Development as a specialized program of English language instruction appropriate for English learner's identified level of language proficiency. The Structured English Immersion (SEI) ELD program is implemented and designed to promote second language acquisition of listening, speaking, reading and writing. Effective language acquisition classroom practices need to be evident for ELs in every classroom.

A broad range of instructional practices and strategies should be employed in supporting ELs to learn content area concepts as they learn the English language. All ELs will be placed in ELD based on their proficiency level, years in the program and teacher recommendation. All ELs will receive Designated ELD and Integrated ELD in their content classes.

Program Requirements

Designated ELD is a core content course for all EL students. Students classified as EL will:
- Be enrolled in daily Designated ELD instruction, Monday through Friday (time equivalent in secondary block scheduled sites),
- Will not be removed from other core content instruction in order to receive Designated ELD instruction,
- Can be placed in an Advisory class focused on supporting ELs, but this Advisory cannot replace an ELD course,
- Will have full access to grade-level content in all disciplines,
- Will be enrolled in grade-level English/language arts, unless they are a newcomer with less than one year of schooling in the United States.

Designated English Language Development

"As part of the standard instructional program provided through general funds, all identified ELs must receive a program of ELD instruction, which includes designated and integrated ELD as defined in 5 CCR Section 11300 (a) and (c), in order to develop proficiency in English as rapidly and effectively as possible and to meet state priorities for ELs. Each LEA must take appropriate action to overcome language barriers that impede equal participation by its students in its instructional programs." - *California Ed Code*

ELD courses are a protected time during the regular school day during which teachers are able to strategically target students' language needs. Placement in ELD courses is based on multiple factors including years in ELD programs, English proficiency level (Emerging, Expanding or Bridging), and overall school academic performance. Instruction in

these courses is designed, implemented and scaffolded to meet the diverse needs of the EL students. These courses are aligned to the CA ELD Standards (2012) and reflect the California ELA/ELD Framework. Designated ELD instruction must reflect the California ELA/ELD Framework. Because secondary EL students are a diverse group of learners in terms of their educational backgrounds, native language literacy, and socioeconomic status, acquiring English proficiency requires the use of a variety of strategies.

High-quality, impactful Designated ELD instruction:

1. Integrates all four language domains (Listening, Speaking, Reading and Writing) into instruction: ELs benefit from the integration of explicit instruction in listening, speaking, reading and writing across the curriculum, regardless of English proficiency level. Oral language practice should not be sacrificed for more time in reading and writing.
2. Provides daily, meaningful speaking practice: ELs benefit from using academic English in structured classroom discussions, small group work, turn-and-talks and presentations. Direct use of response frames and word banks support students when speaking.
3. Teaches components of reading: Begins with phonemic awareness and phonics and adds vocabulary, text comprehension, and fluency. After acquiring basic skills, ELs need to become active readers and writers who use reading and writing processes.
4. Focuses on vocabulary development: The explicit teaching of vocabulary, knowledge of words, word parts, and word relationships is critical if students are to understand topics in a content area. Teachers must teach the multiple meanings of words and help students incorporate words into their expressive vocabularies.
5. Teaches reading comprehension strategies: ELs need to receive explicit instruction about reading comprehension strategies.
6. Builds and activates background knowledge: Connects instruction to what learners already know and then explicitly discusses how that knowledge applies to a new topic.
7. Teaches language through content and themes: Providing content- or theme-based instruction gives ELs a framework for assimilating new information and applying language skills learned across the curriculum.

Newcomers With Formal Education: In their first year at the school, they may receive a double block of ELD, utilizing curriculum such as Inside the USA and or Edge, with supplemental support from Rosetta Stone software or another resource; enroll in grade-level ELA and a rigorous native-level language course (i.e., Native Speaker Spanish, AP Spanish Lang, AP Spanish Lit); as well as taking content courses appropriate for grade level.

Newcomers With Limited Formal Education: In their first year at the school, they may receive a double block of ELD (Emerging), utilizing curriculum such as Inside the USA or Edge, with supplemental support from Rosetta Stone software or another resource; a phonics intervention class, such as Wilson Reading Just Words (if student qualifies via the WIST);

and PE; as well as content course. Schools should assess students' Spanish level to determine if placement in the course is appropriate.

Integrated English Language Development

The mastery of content requires that teachers of English Learners use appropriate ELD strategies to make content comprehensible and accessible. It requires that instruction be organized to support students while teaching cognitively demanding, grade-level content. Instruction in Integrated ELD is based on Common Core State Standards and other content standards (i.e., NGSS and California History Standards) and is provided by content teachers utilizing appropriate strategies to ensure comprehensibility of instruction:

- All ELs will receive Integrated ELD in all content classes throughout their school day
- Integrated ELD teachers will receive professional development that focuses on topics such as CA ELD Standards, key features of Integrated ELD, the ELA/ELD Framework, and strategies that support students to develop proficiency in reading, writing, listening and speaking within the content area
- Integrated ELD content courses are taught by teachers with the appropriate state authorizations

Access to Grade-Level Core Curriculum

To maximize opportunities for language use and content mastery, teachers need to create a safe environment that promotes academic risk-taking. Classroom instruction should focus on both language acquisition and helping students attain the knowledge outlined in the content area standards. Improvement of language and literacy are at the heart of instruction. Integrated classrooms are composed of ELs with mixed levels and abilities as well as other students, but the common goal is to promote academic language. Classrooms that foster language acquisition include:

1. Explicit instruction and use of language structures and vocabulary that are comprehensible to students

2. Integration of listening, speaking, reading and writing skills

3. Use of scaffolds in the learning environment (such as response frames, word banks, graphic organizers) in order to maximize the number of students able to access the content

4. Providing multiple opportunities in every class period for academic discourse using structured group roles, precision partnering and response frames

5. Frequent checks for understanding and purposefully monitoring class during independent and/or group work

6. Weekly student work analysis (formative assessments)

7. Literature within the student's appropriate Lexile level range, available in classroom and school libraries

Request for Removal from English Language Development Program

Parents of English learners have a right to decline or opt their children out of the school's language acquisition program or opt out of particular English learner service(s) within a language acquisition program. (20 U.S.C Section 6318[c][A][vii]) However, the LEA remains obligated to provide the student meaningful instruction (5 CCR Section 11302) until the student is reclassified, inform the parent when progress is not made, and offer the parent programs and services to consider at that time. English Learners may be removed from the ELD program at the request of the student's parent or guardian by completing the Opt-Out Form (Spanish). However, all English Learners, even those who opt-out of the ELD program, must take the Summative ELPAC annually until reclassified.

The process for requesting removal from the ELD program is below.

1. The Opt-Out Form must be requested by a parent/guardian via email, phone call or in person. This may be requested at any time and covers only the current school year.
2. The form must be signed by a parent/guardian and returned to the principal for approval.
3. The signed form must be uploaded to the school's ELL Folder (Opt-Out Folder).
4. Upon approval, the student is removed from the Designated ELD class for the rest of the school year.
5. The student will continue to be identified as an EL until meeting YPICS reclassification criteria.
6. The student will continue to take the ELPAC summative exam in the spring and their progress towards English proficiency will continue to be monitored.
7. If the student does not reclassify after being removed from the ELD program by the fall (August) reclassification cycle of the next school year, the student should be re-enrolled in a Designated ELD course that year.

English Learners with Disabilities

After ELs have been identified using the ELPAC, the school must provide ELs with appropriate language services and programs, and must also provide special education services to ELs who have been identified as students with disabilities under the Individuals with Disabilities Education Act (IDEA) or as qualified students with disabilities under Section 504 of the Rehabilitation Act of 1973. The school must offer appropriate services and supports until ELs can fully participate in the education program without EL support. This includes continuing to provide EL services to the highest levels of English proficiency until students have been reclassified as Fluent English Proficient (RFEP).

Best practices for supporting ELs with disabilities include:

- Students' IEP must have the most recent ELPAC scores and an appropriate language goal.
- Students may be placed in a resource class in addition to, not in place of an ELD course that matches their proficiency level.

- If students are Newcomers or at the beginning stages of English language acquisition, they are placed in a Designated ELD course for students who are Emerging and may be double-blocked for ELD. These students may or may not be placed in ELA courses their first year in the school, but will be placed in Integrated ELD instruction in all core content classes.
- If a parent/guardian selects not to place a student in the ELD course, then the parent/guardian must submit an appropriate waiver and must have an IEP to document this programmatic change.

It is important to note that the requirements in a student's IEP take precedence over EL programming.

If the IEP calls for primary language instruction, the student does not need a parental exception waiver to receive such instruction. State and federal law require that ELs with an IEP continue to receive the programs and services that address the students' special needs, including linguistically appropriate goals and objectives. An IEP must determine which services are appropriate for ELs, based on their particular disabilities and level of English proficiency. Regardless of services prescribed, ELs must also receive EL instruction. If a student with an IEP is placed in an ELD course, the ELD teacher must collaborate with the student's IEP case manager to ensure that instruction effectively meets the student's IEP goals.

GRADING

Students who are ELs are held to the same high expectations as their non-EL peers, and, therefore, these students should be expected to be graded the same way that their peers are graded. However, to ensure these students have an equitable opportunity to learn and succeed in class, students who are ELs should receive specific language supports based on that student's learning needs. If a student did not receive a language support on an assignment or assessment that counts as a weighted grade, the grade should be marked as "S" to denote that the grade is pending student assessment with the proper language support.

TESTING ACCOMMODATIONS

All students deserve an equitable opportunity to demonstrate learning on high-stakes assessments. Accommodations and designated supports make these assessments more accessible to EL students. In addition to a legal and moral obligation to ensure all students receive the supports they need in order to be successful, this is also a major opportunity to improve student performance. The Director of Special Education will provide guidance to administrators for the identification of accommodations and designated supports for students with disabilities, ELs, and all other students who would benefit from supports for the following assessments:

- ELPAC
- California Annual Assessment of Student Progress & Performance (CAASPP)

- Advanced Placement (AP)
- Local State-Verified Assessment systems (e.g., iReady, NWEA, etc.)

On schoolwide interim assessments, there is an embedded support called "Text to Speech" that is most appropriate for students who have been in the country for less than 6 years and are reading at the equivalent of a 1st grade level or below. Additional non-embedded supports (provided in-person at the school by designated personnel) are always encouraged for students who need them. For students with IEPs, these non-embedded supports should be documented in Section K of their IEP. These include:

- Verbally translating test directions
- Bilingual dictionary for students who have been in the country for 3 years or less and are able to read proficiently in Spanish
- Small-group setting
- Extended time
- Read aloud in English
- Scribe (for ELA non-writing items and math items)

Please consult with the school site's Coordinator/Director of Instruction and Director of Special Education for additional guidance on these non-embedded assessment supports.

Exemptions for the ELPAC domains

In some situations, a student's disability may preclude the student from being able to take one or more of the domains. In this situation, a disability exemption may be most appropriate for that student. The CDE's ELPAC Administration Accessibility Checklist will help guide Section 504 and IEP teams in determining whether a student is exempt from taking a domain of the ELPAC. It should be noted that for a student to be assigned an Overall Score, the student will need to be assessed with the ELPAC in at least one domain for both the Oral and Written Language composites. For a student to be considered as having been assessed in Oral Language, the student must have been assessed in either the Speaking or Listening domain. For a student to be considered as having been assessed in Written Language, the student must have been assessed in either the Reading or Writing domain. When Section 504 plan or IEP teams determine that the entire Oral Language composite—Speaking and Listening—or the Written Language composite are to be exempted, the teams should consider the use of an assessment that is alternate to the ELPAC.

SCHEDULING

English Learners enrolling in secondary schools bring a variety of educational and cultural experiences to their classes. Understanding the language and culture of our ELs is the first step needed to develop, implement, monitor and evaluate

an effective schedule to help students progress toward English proficiency, as well as attain challenging content standards in a relatively short period of time. It is critical to identify each student's level of language proficiency, both in English and in the native language.

ELs at the middle school level need large amounts of exposure and support with the English language. In order for ELs to prepare for success in high school, the goal for middle school ELs is to have them reclassify before entering high school. ELs at the high school level need the opportunity to earn credit from day one. The school will ensure that ELs will have access to core curriculum and the appropriate ELD courses. ELD courses are UCOP approved for A-G credit. One year may replace an English "B" course, and the other courses will count as electives. As such, administrators and counselors in both middle schools and high schools should:

- Organize the master schedule around what is best for all students
- Create a master schedule with special populations in mind first
- Hand-schedule ELs into appropriate classes

Whole School Programmatic Considerations

To begin to implement schoolwide programs and practices that support English Learners, schools should consider implementing the following schoolwide practices:

- Schoolwide focus on developing the academic vocabulary of all students, including modeling academic language for students by teachers, counselors and administrators
- Flexible pathways to graduation, such as summer, adult school and after-school programs
- Training for teachers in ELD strategies and best practices
- ELD Push-In Support: ELD teachers or ELD instructional aides provide ongoing support in content

classroom

After conducting thorough intake assessments, interviews and evaluating transcripts, schools can plan for the appropriate class schedule for each EL. It is important to provide students the opportunity to follow a rigorous academic curriculum, which fosters academic success and helps integrate ELs into the school's culture.

EL Progress Monitoring

The YPICS Charter School monitors and regularly assesses the progress of all English Learners, *including those who have opted out of the EL program*, in both English language proficiency and content knowledge throughout the school year. Monitoring student progress identifies students who are not making appropriate progress and allows the school to

provide additional support to enable ELs to reach English proficiency, as well as ensuring that the school is providing ELs meaningful access to grade-level core content instruction and remedying any academic deficits in a timely manner.

Each YPICS school has established documented monitoring systems that include periodic benchmarks to monitor ELs' progress over time, determine when students are not making appropriate progress, notify parents of progress and provide additional support to enable ELs to reach English proficiency and gain grade level content knowledge. The EL Progress Monitoring includes regular communication with parents and includes the following:

- Performance in grade level content classes
- Performance in ELD course
- Student Reading level /local assessments
- SBAC performance

California State Seal of Biliteracy

Many of our EL students become fully bilingual and biliterate. We encourage them to apply for the California's State Seal of Biliteracy, marked by a gold seal on the diploma or transcript, recognizing high school graduates who have attained a high level of proficiency in speaking, reading, and writing one or more languages in addition to English. To qualify students must meet all the criteria outlined by the California Department of Education.

CHAPTER 3: RECLASSIFICATION CRITERIA & EXITING

RECLASSIFICATION OVERVIEW

Reclassification is the process when a student's English language proficiency level changes from English Learner to Reclassified Fluent English Proficiency (RFEP) (EC Section 313(f)). The goal is to prepare students for reclassification as quickly as possible and monitor their progress for four years after reclassification (20 U.S.C. § 6841[a][4][5]; 5 CCR § 11304).

Reclassification Criteria for General Education and Students with Disabilities

English Learners are reclassified to fluent-English proficient based on the following multiple criteria, in alignment with California EC and the State Board of Education recommendations:

1. Assessment of language proficiency, using an objective assessment instrument, including but not limited to, the state test of English language development
2. Teacher evaluation, including but not limited to, a review of the student's curriculum mastery
3. Comparison of student performance in basic skills against an empirically established range of performance in basic skills based on the performance of English proficient students of the same age
4. Parent/guardian opinion and consultation

The chart below outlines the reclassification criteria used by YPICS schools:

Reclassification Criteria			
1. Assessment of Language Proficiency	2. Teacher Evaluation	3. Basic Skills Assessment	4. Parent Consultation
ELPAC - Score of 4 overall	ELA Grade of C (2.0) or higher Fall Reclass Cycle – Semester 1 or 2 of the current school year Spring Reclass Cycle – Semester 1 (Fall of following school year)	"Approaching Grade-Level" on local state-verified data source OR 5-12 Score of Basic, Proficient or Advanced on the Reading Inventory (RI) assessment score OR "Meets" or "Exceeds" on Smarter Balanced Assessment	Once the student meets the reclassification criteria, the parent/guardian is sent the Notification of Reclassification letter and acknowledges the student's change in language classification to Reclassified Fluent English Proficient (RFEP). If the parent/guardian is not in agreement with reclassification, a meeting will be held with the parent and the Reclassification Team to address parent concerns

			and determine the best placement option for the student.

Parent Consultation

Reclassification is a key achievement for EL students, it is important that parents understand the reclassification process and that they are consulted throughout an EL student's journey towards this important milestone. The school can consult with parents in various ways: hold small group in-person or virtual meetings, and or contact via phone prior to sending the Reclassification letter. During the meeting, the EL Coordinator or Designee reviews the Reclassification Eligibility Form with the parent and gathers parent feedback *prior* to reclassifying the student.

Provision for students with Disabilities

Students with disabilities, including those on the alternate curriculum, are to be provided the same opportunities to be reclassified as students without disabilities. Therefore, IEP teams may determine appropriate measures of ELP and performance in basic skills, and minimum levels of proficiency on these measures that would be equivalent to a native English-speaking peer with similar disabilities in the same grade level.

When students do not meet the four criteria for reclassification as established by the school, it is possible for the IEP team to consider reclassification based upon the process outlined in this plan which considers the impact of his/her disability on ELP. Note: If the IEP team believes that a student would still benefit from ELD support because he/she has not fully developed English language proficiency, reclassification may not be appropriate.

IEP teams are authorized to follow the process outlined in this plan complete forms the IEP Reclassification Form In accordance with federal and state law, the IEP team may address the individual needs of each EL with a disability using multiple criteria in concert with the four reclassification criteria in EC Section 313(f). Other criteria may be used to supplement the four required criteria to ensure the most appropriate decision is made for each student. However, at no time does the IEP team have the authority to omit any of the four required criteria or substitute them with alternate criteria.

School Site Responsibilities for Reclassification

The school plays the primary role in the process, and has a number of important responsibilities. The reclassification cycle happens twice per year [Fall Reclassification (August) and Spring Reclassification (February)]. Below is a summary of the school responsibilities.

Task	Timeline	School Site
Reclassification Status Fall/Spring Cycle	Fall Cycle: August - Spring Cycle: February	Access reclassification rosters in TOMS
Parent Consultation: Reclassification Eligibility Form	Fall Cycle: August - Spring Cycle: February	Download, print & mail parent letters; place a signed copy in each student's cumulative folder
Student SELA Status	CALPADS will be updated in August, February and as needed	Reclassified students are changed to RFEP in CALPADS and Infinite Campus
Scheduling	Fall Cycle: August - Spring Cycle: February	Ensure all reclassified students are enrolled in the correct courses (e.g., reclassified no longer in ELD)
Reclassification Parent Notification Letters	Fall Cycle: August - Spring Cycle: February	Download, print & mail parent letters; place a signed copy in each student's cumulative folder

Monitoring Reclassified students

After students have been reclassified as RFEP, the school will continue to monitor their progress for four years to ensure correct classification, placement and academic support as needed. (20 U.S.C. § 6841[a][4][5]; 5 CCR § 11304). If an exited English Learner is not progressing academically and monitoring suggests a persistent language need, the school will provide additional supports, including but not limited to tutoring, accommodations and support classes, including ELD courses.

Assessment results are maintained in electronic form in Infinite Campus (SIS), EL online platform, and data dashboard platform. This allows for rapid access to results in several formats. This information is accessed for a variety of purposes, including (but not limited to) information that relates to reclassification. A summary of the school role in monitoring RFEP students is below.

	School Site Role
RFEP Monitoring Reports	Coordinator/Director of Instruction reviews report and assigns appropriate interventions
Tool Updates	Updates ELA Grade, i-Ready/NWEA and CAASPP

Intervention	Coordinator/Director of Instruction and ELD Teacher assign intervention(s) and continue to monitor impact of intervention(s)
Parent Notification	Coordinator/Director of Instruction must ensure monitoring efforts remain updated and the ELD Teacher regularly communicates student progress to parents

Use of Assessment Data for Student Placement and Instructional Planning

Teachers use interim assessments to analyze student progress for planning differentiated instruction and to provide classroom interventions as appropriate. ELPAC data is used for student placement in appropriate ELD courses in middle and high school.

Teachers use formative assessments in Designated ELD to identify areas of progress and of continuing need for individual students and for groups of students, and for modification of instruction to meet the needs that are revealed by the analysis of this data. CAASPP test results are used in conjunction with diagnostic tests in the language arts and mathematics curricula to identify students in need of benchmark, strategic and intensive interventions, and to assign them to appropriate instructional schedules. students who meet or exceed grade level benchmarks for growth on these assessments will be encouraged to accelerate or move to more advanced groups/classes. Ongoing monitoring of student progress takes place at two levels:

- School, grade level and/or department teams regularly meet to examine student data, determine short-term needs, and plan instruction accordingly. These meetings may include assignment of ELs to appropriate interventions.
- ELD teachers examine school site data, including but not limited to CAASPP, ELPAC, local assessments, and academic performance. ELD teachers are tasked with developing a six-week intervention plan with their school administration and other instructional leaders in order to ensure that all ELs have the supports needed for academic and socio-emotional success.

CHAPTER 4: STAFFING ENGLISH LEARNER PROGRAMS AND TEAMS

STAFFING AND APPROPRIATE TEACHER AUTHORIZATION

Recruiting, developing and retaining excellent educators is essential to the success of our English Learner students. YPICS Charter Schools will hire teachers who are qualified to provide EL services, and core content teachers who are highly qualified in their field as well as trained to support EL students (20 U.S.C. § 6826 [c]; EC §§ 44253.1, 44253.2, 44253.3, 44253.4, 44253.5, 44253.10; Castañeda v. Pickard [5th Cir. 1981] 648 F.2d 989, 1012–1013). These teachers must meet state requirements and have mastered the skills necessary to effectively teach in the EL program.

Recruitment of Teachers Who Hold or Qualify for the Required EL Authorization:

1. Dissemination of Job Announcements: When the school determines the number of new teaching positions estimated to be available during the next school year, job announcements are sent to:
   o EDJOIN website
   o School website
   o Educational placement centers at university campuses with teacher training programs
2. Advertisements: Announcements of openings are placed in organizational newsletters and the Internet.
3. Job fairs: YPICS representatives to colleges and universities to participate in job fair activities.

Certification Requirement Summary & Staffing Approach

Per the California Commission on Teacher Credentialing: "California statute requires that every teacher who provides instructional services to an English Learner be authorized to provide specialized instruction for those learners."1 To provide students with teaching personnel who hold appropriate credentials necessary to instruct ELs, YPICS and its schools actively recruit and hire teachers who are fully EL Authorized. If candidates who hold an EL Authorization are not available, the YPICS Human Resources Team obtains the necessary documents from qualified candidates to apply for an Emergency EL Authorization Permit. These permit holders must hold either an active permit or full EL Authorization to continue in their assignment. Failure to take timely action may result in a change of employment status. Teachers who are new to YPICS and do not have the required EL Authorization are required to sign an EL Authorization Agreement indicating their intention to complete the requirement. Annual progress toward the EL Authorization is monitored by the Credential Manager, but it is the teacher's responsibility to earn the authorization.

Student ELD Enrollment and Teacher Credentials

All EL students must be enrolled in the appropriate ELD course, including those with IEPs. All courses with English Learners require the appropriate authorization to teach ELs (CLAD, BA, BCLAD, BCC, LDS, etc.) The following

authorizations are not considered full EL Authorizations: CCSD (including SB 1949/SB395/AB2913) and the newly embedded EL authorizations with the following codes: ELAM, ELAS, ELAE, or ELA3.

California Prepared Credentials

Currently, credentials that are California prepared are embedded with a basic EL Authorization. Teachers who earned Ryan or Standard teaching credentials prior to inclusion of the ELA preparation and authorization within the preliminary teaching credential must earn an EL Authorization.

Credentials Based on Out-of-State Preparation

Teachers who applied for a California credential based on out-of-state preparation who did not hold a comparable out-of-state EL authorization must earn an EL Authorization such as the CLAD or BCLAD.

Departmentalized English Language Development (ELD)

Teachers teaching departmentalized ELD courses must have (in addition to their teaching credential) a specific EL Authorization that is aligned to ELD in a departmentalized setting. Examples of aligned EL Authorizations include: ELA1, BA**2, R1WL/ELD, S22/S-22, R-3/R3B, S6/S-6, and S14, as long as the prerequisite credential is not a Designated Subjects Adult Education Teaching Credential, Child Development Instructional Permit, or a Child Development Supervision Permit.

Specially Designed Academic Instruction in English (SDAIE)

Teachers teaching in an SDAIE setting must have (in addition to their teaching credential) an EL Authorization, such as ELAS, ELAM, ELAE or any of those aligned to ELD in a departmentalized setting: ELA1, BA**, R1WL/ELD, S22/S-22, R-3/R3B, S6/S-6, or S14. An insufficient authorization would be S17S, for example.

Overall Procedures for Assuring Sufficient Qualified Staff

In the spring of each year, the following steps must take place:
- Projects need for Designated ELD sections
- Projects need for English Language Arts classrooms or Integrated ELD sections
- Tentatively staff classrooms/sections with certified staff or anticipates vacancies

YPICS Human Resources
- Reviews projections of certificated and classified staff for compliance with timelines in negotiated contracts
- Reviews anticipated vacancies
- Requests appropriate authorizations
- Monitors completion of required university courses toward initial certification

Coordinator/Director of Instruction (C/DoI) & EL Program Coordination

The coordination of the ELD program is the responsibility of the Coordinator/Director of Instruction. The C/DoI is an integral part of the school's instructional leadership team and leads ELD strategy at their school site. In collaboration with the English Language Development (ELD) Teacher, the Coordinator/Director of Instruction is responsible for ensuring all English Learner (EL) students are supported academically and social emotionally and will collaborate with counselors, teachers and families to support EL student success. The Coordinator/Director will create and implement the site's ELD program and coach classroom teachers to effectively use appropriate strategies to ensure strong outcomes for EL students. In addition to these leadership duties, the Coordinator/Director may also provide direct ELD instruction in the classroom.

EL School Teams

An EL School Team is a team of professionals that share a vision, work toward building a culture of collaboration and assume shared responsibility for both outcomes and duties. A team approach creates a means for EL students to receive holistic support that ensures that students are receiving what they need both emotionally and academically.

Recommended Team Member Roles and Responsibilities:

	School Leadership Team	C/D of Instruction	EL Teacher	Other Participants
Site Team Meetings	Establishes EL Site team, attends and participates in all site EL meetings	Organizes and leads EL site team to meet, establish norms, responsibilities and meeting days/times for the year	Attends and participates all site EL meetings	May attend meeting if needed
ELPAC Testing (Initial – August) (Summative - February-May)	Ensures that testing delegation instructions are clear. Holds team accountable	Coordinates and facilitates administration of ELPAC (Initial & Summative); this includes training, scheduling, and receipt and delivery of materials	Facilitates intentionally designed lessons throughout the year that prepare students for the summative ELPAC	Testing coordinator (if different from EL Coordinator) Parent Engagement Specialist: Leads workshop for parents on supporting their student on ELPAC
EL Progress Monitoring	Determines professional development and coaching to support teachers based on analysis	Gathers student data and student written work from core subjects for analysis Facilitates team review of student data (work analysis and assessment)	Provides ELD work samples for analysis Creates reteach plans for class	Teachers: As needed RSP teacher: Participates in review with focus on students with IEPs

	School Leadership Team	C/D of Instruction	EL Teacher	Other Participants
		Highlights EL students with IEPs		
SAC/EL-PAC* (August through June) *Minimum of 4 meeting required	Holds team accountable Supports with calendaring meetings, presents at meeting (if applicable) Allocates funds for meeting snacks Ensures SAC/EL-PAC is part of the LCAP/SPSA process	Provides annual training to SAC/EL-PAC members so they are able to meet all requirements Coordinates, schedules meetings and supports SAC/EL-PAC parent Facilitator and ensures all requirements are met Recruits parents, works with parents in planning and creating agenda, presents at meetings if applicable, assigns recorder Ensures SAC/EL-PAC assists in the development of the needs assessment Responsible for gathering all required documentation and uploading to SAC/EL-PAC folder Keeps accurate meeting records Plans and assists with SAC/EL-PAC parent appreciation celebration at end of school year	Attends and/or presents at SAC/EL-PAC meeting when applicable	Parent Coordinator Creates flyers, sign-in sheet; actively recruits parents for every SAC/EL-PAC meeting (flyers, parent square, calls); sets up meeting room (projector, writing utensils, snacks); welcomes parents to meeting Teachers: As needed to share insight on support
Reclassification (September: Fall Cycle February: Spring Cycle)	Informs all staff of Reclassification Holds team accountable	Coordinates/facilitates organization of site reclassification documents Organizes parent meetings with Parent Coordinator	Flags any mistakes in reclassification list Supports counselors with new class assignments for RFEP students	Counselors: Changes RFEP student schedules with input from ELD teacher Parent Engagement Specialist: Mail RFEP letters home and ensure

	School Leadership Team	C/D of Instruction	EL Teacher	Other Participants
		Supports in collection of necessary documentation Communicates any mistakes to Home Office		that parents sign and return letter
Reclassification Monitoring	Holds team accountable for follow through	Using EL online platform as a tool as a guide, flags students who need more support Facilitates team review of RFEP student data – assists determining intervention Creates systems for RFEP parent consultation and for the collection of signed letters	Collaborates with team and students' teachers to suggest interventions	Teachers: As needed Parent Coordinator: Contact parent and set up meeting if needed, follow up with parents regarding consultation and collection of signed letters
School EL Support Walkthrough	Facilitates walkthrough and debrief Creates plans based on feedback gathered	Schedules day and activities Invites participants Determines means of collecting feedback Records feedback	Participates in walkthrough Provides feedback	1-2 Teachers RSP teacher, Parent Coordinator, Instructional Aides/Tutors: Participate in walkthroughs
Professional Development: ELD strategies for content areas	Supports as needed	Schedules and plans professional development for content teachers on best practices to support ELs Provides Instructional Leadership coaching guidance Plans follow through observations	Assists admin in planning professional development for content teachers May present strategy to teachers	Instructional Leadership: Coaching guidance Teachers: Participate in professional development and apply strategies
EL testing accommodations	Holds team accountable	Attends EL-related training Completes all necessary documentation Ensures that EL accommodations are	Supports as needed	RSP: Works with EL Coordinator and Testing coordinator to ensure that accommodations are aligned with IEPs

	School Leadership Team	C/D of Instruction	EL Teacher	Other Participants
		requested for all assessments		
Movement through Program and Placement	Holds team accountable Monitors and ensures follow-through	MS: Coordinates and schedules transition meeting with high school Identifies highest needs ELs with assistance from RSP and Counselors HS: Ensures that course offerings support EL students' language needs and meet A-G requirements Works with Counselor to ensure that EL students have a graduation plan For Seniors: Carefully tracks progress towards graduation	Supports as needed	Counselor: Heavy support with transition and graduation plans Tracks EL progress towards promotion (MS) or graduation (HS) Parent Coordinator: Works closely with C/DoI and Counselor to ensure that parents are informed about student progress, important meetings and deadlines

This team approach is designed to ensure the success of our English learners enrolled in the school. The combination of administration, coordinators, teachers, and parent-facing roles ensures the following programmatic features are correctly implemented and monitored:

- Reclassification follow through including parent consultation
- ELPAC Testing (Initial/Summative)
- EL student progress monitoring
- RFEP progress monitoring
- ELAC/EL-Parent Advisory Committee (EL-PAC) formation and meetings
- EL testing accommodations (ELPAC, CAASPP)
- Ensure that all EL students' Cumulative Records have all the required documentation

CHAPTER 5: PROFESSIONAL DEVELOPMENT FOR ALL TEACHERS WHO WORK WITH ENGLISH LEARNERS

PROFESSIONAL DEVELOPMENT OVERVIEW

In order to create an effective English Learner Program, YPICS Charter Schools will foster a school culture that is mindful of the contributions of students from diverse linguistic, cultural and experiential backgrounds. The school provides students with structures and processes that address the needs of all students. School leaders engage guidance counselors, teachers and staff in order to provide professional development that promotes a culturally aware, instructionally sound, schoolwide system of support.

EL-Specific Professional Development

YPICS Charter Schools will provide a series of EL specific professional development aligned to our ELD goals in order to effectively implement the school's EL program (Castaneda v. Pickard [5th Cir. 1981]648 F.2d989, 1011-1013). Professional development is provided to classroom teachers, administrations and staff that is:

(a) Designed to improve the instruction and assessment of ELs;

(b) Designed to enhance the ability of teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for ELs;

(c) Effective in increasing the student's English language proficiency or substantially increasing the teacher's subject matter knowledge, teaching knowledge, and teaching skills as demonstrated through classroom observation; and

(d) Of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teacher's performance in the classroom. (20 U.S.C. Section 6825[c][2][A–D])

The school hosts a series of virtual EL professional development events throughout the year that focus on providing ELD and core teachers with the tools, strategies, and best practices to support EL students to increase their English language proficiency in the four domains: speaking, listening, reading and writing.

ELPAC Testing Professional Development

The state mandates that each school send ELPAC coordinators to an in-person training. In light of the measures being taken nationwide to attempt to slow the spread of coronavirus disease 2019 (COVID-19), the California Department of Education, and the Sacramento County Office of Education (SCOE) will continue the virtual training modules format for the Initial English Language Proficiency Assessments for California (ELPAC) Administration and Scoring Training. Each local educational agency (LEA) will be required to complete the online certification. Virtual training modules for LEA

ELPAC coordinators and ELPAC test examiners will be available in the Moodle Training Site. Virtual training for the computer-based Initial ELPAC will launch in the Spring on Moodle. All current and new Moodle users will need to establish new user accounts for the ELPAC Moodle Training Site.

CHAPTER 6: PARENT ENGAGEMENT

PARENT ENGAGEMENT OVERVIEW

Community is one of the YPICS schools' core values. We empower parents with information in order for them to advocate and participate in meaningful ways. Parents must work with school staff to promote student achievement and increase college and career opportunities for our students. In order for us to ensure English Learner parent participation, we must:

- Welcome parents in the school by creating a safe and inviting school culture
- Have regular, two-way communication between the school and home
- Make parents a full partner in the decisions that affect EL students

Welcoming Parents

A welcoming school environment can make a tremendous difference for EL families. Many staff members are bilingual, and the Parent Coordinator is ready to support families as they enroll in our schools. Getting to know EL families helps build an important relationship based on trust that can pave the way to student success. The following best practices ensure that schools welcome EL families warmly:

- **Enrollment Process:** The enrollment process can be complicated; however, the Parent Coordinator and/or bilingual staff in the main office should assist parents with completing applications, requesting documentation and answering questions they may have.
- **Reclassification Consultation:** Reclassification is a key achievement for EL students, it is important that parents understand the reclassification process and are consulted throughout an EL student's journey towards this important milestone.
- **Parent Orientation:** All new incoming parents attend a school orientation at the beginning of the school year. Parent orientation is the first step toward student success. It is important that EL parents and/or guardians are urged to attend. During orientation, parents learn about the school's academic and extracurricular programs, EL program, promotion/graduation requirements, college counseling, bell schedule, academic calendar and school resources. Bilingual staff should be available to provide translation services and support EL families.
- **EL Parent Welcome Packet:** All new EL parents can receive an ELD Parent Welcome Packet, which contains information (English/Spanish) on the ELD parent options, EL school contact information and community resources that assist families with learning English, translation and other helpful resources. The Home Office provides resources that schools can use to create their packet.

- **Parent Workshops:** The school can provide opportunities for parents to participate in a variety of workshops, such as Health and Nutrition, A-G requirements and Navigating the Cal-State/UC systems. Schools provide English/Spanish translations.
- **School Website:** School website is a resource of information for parents. In addition to school news, websites will publish EL (team or designee) contact information, translated parent handbooks and translated Board of Directors (BoD) agendas and minutes.
- **Phone Calls Home:** School employs the use of an automated calling system as well as direct outreach to contact parents with information regarding student attendance, upcoming events, etc.
- **Flyers:** Bilingual flyers (English/Spanish) can be sent home with important information, such as school events, parent conferences, parent workshops, field trips, etc.
- **Progress Reports:** Schools mail parents their student's academic progress reports every five weeks.
- **Progress Monitoring:** Consistent communication to parents regarding their student's EL /RFEP progress towards academic success.
- **EL Parent Letters:** School mails home translated letters (English/Spanish) to inform parents of EL assessment, EL Annual Notification and placement, and RFEP monitoring.

Partners in Decision-Making

English Learner Parent Advisory Committees (EL-PAC): The major function of the EL-PAC committee is to advise and make recommendations to the Executive Administrator and School Advisory Committee (SAC) on the implementation and evaluation of the school's services for ELs. The following chart provides a timeline of recommended actions for the EL-PAC:

Date	Action/Activity	Goal/Commitment
October	School Board meeting & EL Master Plan	The Board of Directors will be informed of the authorizer requirements for formation of an advisory committee separate from the District-approved petitions that allowed for the needs of the EL student group to be addressed through the School Advisory Committee. Specific guidance will be communicated to the board regarding the formation of the council and the requirements. The Board approves the EL Master Plan, which details how to strategically address the recommendations of parents around the educational program for ELs.
October	School Advisory Committee (SAC) & English Learner Advisory Committee (EL-PAC)	Flyers, phone calling system, school newsletters and the school website will be used to promote parent involvement in the SAC/EL-PAC This advisory committee will conduct the activities outlined in state guidance.
November	SAC/ EL-PAC #1	The following topics must be covered: • Language Census

Date	Action/Activity	Goal/Commitment
		- CAASPP data in ELA and Math - ELPAC and reclassification data - i-Ready - School attendance policy/plan and data - Parent involvement opportunities and data *Delegation of Authority by the EL-PAC, reclassification data and EL program services at school site. LCAP Overview.
December/ January	SAC/ EL-PAC #2	The following topics must be covered: - EL achievement data (Interims) - California Dashboard - i-Ready Data - Student Attendance & Chronic Absenteeism - Parent involvement /education opportunities - EL Graduation/Promotion progress - LCAP update - Reclassification criteria - ELPAC Summative Assessment overview
March/April	SAC/ EL-PAC #3	The following topics must be covered: - Spring Reclassification - EL Graduation/Promotion progress - LCAP review and feedback - Student attendance data
May/June	SAC/ EL-PAC #4	The following topics must be covered: - Student attendance data - EL achievement data (Interims) - LCAP for next school year - EL Graduation/Promotion progress - Student attendance data

Process for Parent Request for Language Acquisition Program

Proposition 58 (Prop 58), otherwise known as Global CA 2030, an initiative set aside by Governor Brown provides for districts and charters to have a process in place should parents of a school request a language acquisition program within a school or district. The threshold pertaining to requests is either 20 parents at a singular grade level requesting a program or 30 parents school wide.

Receiving and Tracking Parent Requests: The school is required to maintain written records of parent requests (even if the request is made verbally) which include:

- Date of request
- Parent and student names
- Description of request
- Grade level

When the threshold is met (20 requests at grade level or 30 at the site), the sixty-day requirement to respond to request time begins.

Communication: Within ten (10) days (these 10 days are part of the 60-day requirement) of reaching the threshold, the school site, in partnership with the LSC, will notify the parents of students attending the school, the school's teachers, administrators, English Learner Parent Committee and the School Advisory Council in writing, of the parents' requests for a language acquisition program.

Cost and Resource Analysis: The site administrator and the Chief Operations Officer (COO) will then carry out the following process and conduct a cost and resource analysis.

A. COO works with the site principal and community stakeholders to determine the fiscal commitment necessary to implement a high-quality language program. Costs and resources to be considered include but are not limited to:
1. Certificated teachers with appropriate authorizations
2. Space
3. Curriculum and instructional resources
4. Pertinent Professional Development for the proposed program
5. Infrastructure
6. Time for implementation
7. Parent and community engagement

3. Determination: Upon completion of the cost and resources analysis, the site administrator in consultation with the Chief Accountability Officer (CAO) will determine whether it is possible to implement the requested language acquisition program.

    A. Within 60 calendar days of reaching the threshold described above, the school will provide notice in writing to the parents of the students attending the school, the school's teachers and administrators of its determination.
- Determination to implement language acquisition program at the school: should the school be able to implement the program, the school will publish a reasonable timeline of actions necessary to implement the language acquisition program. As part of the implementation, the school leadership confers with school personnel including administration, and teachers with the authorizations required to provide or oversee programs and services for ELs, regarding the design and content of the language acquisition program.

- Determination not to implement language acquisition program at the school: in the case where it is determined that it is not possible to implement a language acquisition program requested by the parents, the school shall provide in written form an explanation of the reasons that the program cannot be provided and may offer an alternative option that can be implemented at the school. Citations: EC Sections 305 and 310; 5CCR Section 11311 and 11312

CHAPTER 7: PROGRAM EVALUATION

PROGRAM EVALUATION OVERVIEW

Evaluating the English Learner program, practices and procedures involves systematic planning and implementation, aggregating and synthesizing various types of data, to learn about program success. Both formative and summative evaluation should be applied to questions about practices, services and procedures.

Evaluation should be ongoing so that data is constantly being gathered and examined to guide decisions about what does or does not work and why. A formative evaluation during the first semester will provide an opportunity to apply evaluation feedback and make improvements to the program immediately.

A summative evaluation at the end of the year will help the school identify the successes of the program, practices, procedures, or activities, as well as identify the areas needing improvement. Recommendations about whether or not practices should be continued are determined for the next school year. Formative and summative evaluations together are powerful tools for making educational decisions and setting policies about programs and practices for ELs.

A system of program evaluation can provide a rich source of information for teaching and guiding ELs' learning, assist in gauging the effectiveness of practices and procedures that support ELs, contribute to student achievement, and satisfy reporting requirements, especially those related to student success.

EL Program Needs Assessment

An Annual EL Needs Assessment will be conducted by the Charter School under the streamlined responsibilities to the School Advisory Council (SAC)/EL-PAC. The recommendations should be shared with the Executive Administrator and in collaboration, next steps will be identified based on the recommendations. These next steps will be shared with SAC/EL-PAC.

Coversheet

Board Resolution #2425-01: MORCS Renewal Petition Submission to LAUSD

Section: IV. Items Scheduled For Action
Item: C. Board Resolution #2425-01: MORCS Renewal Petition Submission to LAUSD
Purpose: Vote
Submitted by:
Related Material: #2425-01 Board Resolution MORCS Renewal.pdf
                         24-08-09 Renewal MORCS Summary Budget.pdf
                         24-08-09 Renewal MORCS Detail Budget.pdf

YPI CHARTER SCHOOLS
BOARD OF TRUSTEES

RESOLUTION #2425-01 AUTHORIZING SUBMISSION OF CHARTER RENEWAL PETITION
TO LOS ANGELES UNIFIED SCHOOL DISTRICT BOARD OF EDUCATION

WHEREAS, YPI Charter Schools is a California nonprofit public benefit corporation that operates Monseñor Oscar Romero Charter (the "Charter School"), a California public charter school; and

WHEREAS, the Board of Trustees ("Board") of YPI Charter Schools finds it in the best interest of the Charter School to submit a charter renewal petition application ("Renewal") of the Monseñor Oscar Romero Charter as authorized by the Los Angeles Unified School District ("LAUSD") and provided for in Education Code Sections 47605, 47607 and 47607.2.

NOW THEREFORE, BE IT RESOLVED that the Board authorizes the submission of the Monseñor Oscar Romero Charter Renewal to the LAUSD Board of Education for a term of July 1, 2025 to June 30, 2030; and

BE IT FURTHER RESOLVED that the Board authorizes the following individuals to take all steps necessary pursuant to their roles to seek the approval of the Renewal:

- Ena LaVan will serve as "Lead Petitioner" and is hereby authorized to make any additional changes or revisions to the Renewal as may be necessary to comply with applicable legal requirements and/or District policies and procedures, and to take all steps necessary for approval of same;
- Freddy Zepeda is the Executive Administrator/Principal;
- Ena LaVan is the Chief Accountability Officer; and
- Ruben Dueñas, Chief Operating Officer, is the Financial Manager.

*   *   *

IN WITNESS WHEREOF, the Board of Directors has adopted the above resolution by the following vote at a regular Board meeting this 13th day of August, 2024.

AYES:

NOS:

ABSTENTIONS:

By:_____
Mary Keipp, Chairperson of the Board of Trustees

By:_____
Sandra Mendoza, Secretary

MONSENOR OSCAR ROMERO CHARTER SCHOOL

Multi-Year Budget Summary

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	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30
Total Enrollment	286	295	329	351	357	360
ADA	271.70	281.73	314.20	335.21	340.94	343.80
% Free and Reduced	89%	89%	89%	89%	89%	89%
% English Language Learners	38%	38%	38%	38%	38%	38%
% Unduplicated Low Income, EL, Foster Youth	95%	95%	95%	95%	95%	95%
INCOME						
8011-8098 · Local Control Funding Formula Sources	3,917,767	4,176,387	4,804,868	5,296,648	5,565,890	5,798,497
8100-8299 · Federal Revenue	705,857	525,625	542,143	569,390	577,444	581,226
8300-8599 · Other State Revenue	1,428,445	1,450,193	1,026,264	1,061,792	833,589	837,166
8600-8799 · Other Local Revenue	381,946	391,611	422,915	443,171	448,695	451,458
Grants/Fundraising	20,000	20,000	20,000	20,000	20,000	-
8999 · Other Prior Year Adjustment	-	-	-	-	-	-
TOTAL INCOME	**6,454,015**	**6,563,817**	**6,816,191**	**7,391,002**	**7,445,618**	**7,668,346**
EXPENSE						
1000 · Certificated Salaries	2,116,877	2,180,383	2,245,795	2,313,169	2,382,564	2,454,041
2000 · Classified Salaries	917,979	945,519	973,884	1,003,101	877,834	904,169
3000 · Employee Benefits	894,080	928,483	964,298	1,001,585	1,012,870	1,052,188
4000 · Supplies	530,917	551,618	628,177	672,105	691,244	706,091
5000 · Operating Services	1,754,468	1,759,112	1,848,822	1,963,601	2,042,819	2,108,836
6000 · Capital Outlay	765,064	760,775	749,229	740,584	734,334	725,584
7000 · Other Outgo	145,165	141,523	137,808	134,017	130,151	126,206
TOTAL EXPENSE	**7,124,550**	**7,267,413**	**7,548,013**	**7,828,161**	**7,871,815**	**8,077,114**
NET INCOME	**(670,535)**	**(703,596)**	**(731,823)**	**(437,160)**	**(426,197)**	**(408,768)**
Operating Income	94,529	61,468	28,952	312,069	314,387	325,566
Ending Cash Balance	3,392,796	2,345,985	2,107,939	2,161,357	2,258,407	2,119,326

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
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	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
Enrollment	286	295	329	351	357	360		
ADA	271.70	281.73	314.20	335.21	340.94	343.80		
ADA %	95%	96%	96%	96%	96%	96%		
UPP	95%	95%	95%	95%	95%	95%		
Income								
8011-8098 · Local Control Funding Formula Sources								
8011 Local Control Funding Formula	2,532,916	2,729,921	3,178,998	3,547,102	3,770,724	3,971,878	39%	7%
8012 Education Protection Account	346,210	369,502	424,781	468,141	491,856	512,357	5%	7%
8019 Local Control Funding Formula - Prior Year	-						0%	-100%
8096 In Lieu of Property Taxes	1,038,641	1,076,964	1,201,089	1,281,405	1,303,309	1,314,261	16%	6%
8098 In Lieu of Property Taxes, Prior Year	-						0%	-100%
Total 8011-8098 · Local Control Funding Formula Sources	**3,917,767**	**4,176,387**	**4,804,868**	**5,296,648**	**5,565,890**	**5,798,497**	**61%**	**7%**
8100-8299 · Federal Revenue							0%	
8181 Special Education - Federal (IDEA)	66,102	68,541	76,441	81,552	82,946	83,643	1%	1%
8221 Child Nutrition - Federal	266,146	274,521	306,161	326,633	332,217	335,009	4%	5%
8223 CACFP Supper	-	-	-	-	-	-	0%	
8291 Title I	123,068	123,068	123,068	123,068	123,068	123,068	2%	0%
8292 Title II	12,048	12,048	12,048	12,048	12,048	12,048	0%	0%
8294 Title III	13,546	13,986	14,426	16,089	17,165	17,458	0%	8%
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	214,947	23,461	-	-	-	-	3%	-76%
Total 8100-8299 · Other Federal Income	**705,857**	**525,625**	**542,143**	**569,390**	**577,444**	**581,226**	**11%**	**-48%**
8300-8599 · Other State Revenue								
8520 Child Nutrition - State	101,047	104,227	116,240	124,013	126,132	127,192	2%	1%
8550 Mandate Block Grant	5,146	5,611	5,997	6,909	7,614	8,000	0%	2%
8560 Lottery Revenue	77,472	80,330	89,589	95,580	97,213	98,030	1%	-8%
8587 State Grant Pass-Through	-	-	-	-	-	-	0%	
8591 SB740	-	-	-	-	-	-	0%	
8592 State Mental Health	21,986	22,797	25,425	27,125	27,588	27,820	0%	7%
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	205,429	265,950	282,305	295,323	308,228	308,228	3%	-12%
8596 Prop 28 Arts & Music	49,978	51,602	53,226	59,360	63,330	64,412	1%	0%
8599 State Revenue - Other	763,904	716,193	250,000	250,000	-	-	12%	93%
Total 8300-8599 · Other State Income	**1,428,445**	**1,450,193**	**1,026,264**	**1,061,792**	**833,589**	**837,166**	**22%**	**31%**

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
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	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
8600-8799 · Other Local Revenue								
8631 Sale of Equipment & Supplies	-	-	-	-	-	-	0%	
8634 Food Service Sales	-	-	-	-	-	-	0%	
8650 Leases & Rentals	-	-	-	-	-	-	0%	
8660 Interest & Dividend Income	70,000	70,000	70,000	70,000	70,000	70,000	1%	-39%
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%	-100%
8694 In Kind Donations	-	-	-	-	-	-	0%	
8695 Contributions & Events	20,000	20,000	20,000	20,000	20,000	-	0%	25216%
8696 Other Fundraising	-	-	-	-	-	-	0%	
8697 E-Rate	15,000	15,000	15,000	15,000	15,000	15,000	0%	-52%
8698 SELPA Grants	15,000	15,000	15,000	15,000	15,000	15,000	0%	2%
8699 All Other Local Revenue	20,000	20,000	20,000	20,000	20,000	20,000	0%	30%
8792 Transfers of Apportionments - Special Education	261,946	271,611	302,915	323,171	328,695	331,458	4%	14%
Total 8600-8799 · Other Income-Local	**401,946**	**411,611**	**442,915**	**463,171**	**468,695**	**451,458**	**6%**	**-2%**
Prior Year Adjustments								
8999 Other Prior Year Adjustment	-						0%	-100%
Total Prior Year Adjustments	**-**	**-**	**-**	**-**	**-**	**-**	**0%**	**-100%**
TOTAL INCOME	**6,454,015**	**6,563,817**	**6,816,191**	**7,391,002**	**7,445,618**	**7,668,346**	**100%**	**-1%**
Expense								
1000 · Certificated Salaries								
1110 Teachers' Salaries	1,596,641	1,644,540	1,693,876	1,744,693	1,797,033	1,850,944	22%	14%
1120 Teachers' Hourly	-	-	-	-	-	-	0%	
1170 Teachers' Salaries - Substitute	-	-	-	-	-	-	0%	
1175 Teachers' Salaries - Stipend/Extra Duty	161,756	166,609	171,607	176,755	182,058	187,520	2%	-17%
1211 Certificated Pupil Support - Librarians	-	-	-	-	-	-	0%	
1213 Certificated Pupil Support - Guidance & Counseling	105,355	108,516	111,772	115,125	118,578	122,136	1%	50%
1215 Certificated Pupil Support - Psychologist	76,028	78,308	80,658	83,077	85,570	88,137	1%	20%
1299 Certificated Pupil Support - Other	-	-	-	-	-	-	0%	
1300 Certificated Supervisors' & Administrators' Salaries	177,097	182,410	187,882	193,518	199,324	205,304	2%	2%
1900 Other Certificated Salaries	-	-	-	-	-	-	0%	
Total 1000 · Certificated Salaries	**2,116,877**	**2,180,383**	**2,245,795**	**2,313,169**	**2,382,564**	**2,454,041**	**30%**	**11%**
2000 · Classified Salaries								
2111 Instructional Aide & Other Salaries	240,448	247,661	255,091	262,744	208,588	214,846	3%	20%

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
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	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
2121 After School Staff Salaries	-	-	-	-	-	-	0%	
2131 Classified Teacher Salaries	-	-	-	-	-	-	0%	
2200 Classified Support Salaries	89,467	92,151	94,916	97,763	100,696	103,717	1%	7%
2300 Classified Supervisors' & Administrators' Salaries	24,552	25,289	26,048	26,829	27,634	28,463	0%	-39%
2400 Classified Office Staff Salaries	534,482	550,516	567,031	584,042	508,242	523,489	8%	-1%
2900 Other Classified Salaries	29,030	29,901	30,798	31,722	32,674	33,654	0%	-12%
Total 2000 · Classified Salaries	**917,979**	**945,519**	**973,884**	**1,003,101**	**877,834**	**904,169**	**13%**	**2%**
Total 1000-2000 · Salaries	**3,034,856**	**3,125,902**	**3,219,679**	**3,316,269**	**3,260,398**	**3,358,210**	**43%**	**8%**
3000 · Employee Benefits								
3111 STRS - State Teachers Retirement System	404,324	416,453	428,947	441,815	455,070	468,722	6%	14%
3212 PERS - Public Employee Retirement System	-	-	-	-	-	-	0%	
3213 PARS - Public Agency Retirement System	-						0%	
3311 OASDI - Social Security	56,915	58,622	60,381	62,192	54,426	56,058	1%	1%
3331 MED - Medicare	44,005	45,326	46,685	48,086	47,276	48,694	1%	8%
3401 H&W - Health & Welfare	379,057	398,010	417,910	438,806	446,568	468,897	5%	5%
3501 SUI - State Unemployment Insurance	1,517	1,563	1,610	1,658	1,630	1,679	0%	-63%
3601 Workers' Compensation Insurance	-	-	-	-	-	-	0%	
3751 OPEB, Active Employees	-						0%	
3901 Other Retirement Benefits	8,262	8,510	8,765	9,028	7,901	8,138	0%	-37%
3902 Other Benefits	-						0%	-100%
Total 3000 · Employee Benefits	**894,080**	**928,483**	**964,298**	**1,001,585**	**1,012,870**	**1,052,188**	**13%**	**8%**
Total 1000-3000 · Salaries & Benefits	**3,928,936**	**4,054,385**	**4,183,977**	**4,317,855**	**4,273,268**	**4,410,398**	**55%**	**8%**
4000 · Supplies								
4111 Core Curricula Materials	41,111	43,676	68,661	75,669	79,272	82,336	1%	-26%
4211 Books & Other Reference Materials	3,500	3,718	4,275	4,711	4,935	5,126	0%	-89%
4311 Student Materials	77,370	81,605	92,985	101,529	105,486	108,681	1%	-36%
4351 Office Supplies	8,400	8,400	8,400	8,400	8,400	8,400	0%	-13%
4371 Custodial Supplies	8,400	8,400	8,400	8,400	8,400	8,400	0%	-42%
4391 Food (Non Nutrition Program)	12,800	13,184	13,590	14,039	14,460	14,893	0%	-10%
4392 Uniforms	13,000	13,390	13,802	14,258	14,686	15,126	0%	0%
4393 PE & Sports Equipment	4,400	4,532	4,672	4,826	4,971	5,120	0%	-47%
4395 Before & After School Program Supplies	2,043	2,107	2,350	2,507	2,550	2,571	0%	2%
4399 All Other Supplies	13,000	13,390	13,802	14,258	14,686	15,126	0%	-71%
4411 Non Capitalized Equipment	58,000	59,740	61,580	63,612	65,520	67,486	1%	-54%
4711 Nutrition Program Food & Supplies	288,894	299,475	335,661	359,897	367,879	372,825	4%	2%
4713 CACFP Supper Food & Supplies	-	-	-	-	-	-	0%	
Total 4000 · Supplies	**530,917**	**551,618**	**628,177**	**672,105**	**691,244**	**706,091**	**7%**	**-27%**

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
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	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
5000 · Operating Services								
5211 Travel & Conferences	9,599	8,857	9,130	9,431	9,714	10,005	0%	-44%
5311 Dues & Memberships	7,230	7,681	8,830	9,732	10,195	10,589	0%	-31%
5451 General Insurance	-	-	-	-	-	-	0%	
5511 Utilities	96,000	98,880	101,926	105,289	108,448	111,701	1%	-2%
5521 Security Services	1,440	1,483	1,529	1,579	1,627	1,676	0%	0%
5531 Housekeeping Services	36,000	37,080	38,222	39,483	40,668	41,888	1%	-19%
5599 Other Facility Operations & Utilities	145,764	154,862	178,029	196,202	205,543	213,488	2%	27%
5611 School Rent - Private Facility	-	-	-	-	-	-	0%	
5613 School Rent - Prop 39	-	-	-	-	-	-	0%	
5619 Other Facility Rentals	-	-	-	-	-	-	0%	
5621 Equipment Lease	23,320	24,020	24,759	25,576	26,344	27,134	0%	4%
5631 Vendor Repairs	5,000	5,312	6,107	6,730	7,051	7,323	0%	-83%
5812 Field Trips & Pupil Transportation	22,800	24,223	27,847	30,689	32,150	33,393	0%	-53%
5821 Legal	-	-	-	-	-	-	0%	-100%
5823 Audit	-	-	-	-	-	-	0%	
5831 Advertisement & Recruitment	6,000	6,374	7,328	8,076	8,461	8,788	0%	-89%
5841 Contracted Substitute Teachers	60,000	61,800	63,703	65,806	67,780	69,813	1%	-25%
5842 Special Education Services	60,000	63,745	73,281	80,761	84,606	87,877	1%	-49%
5843 Non Public School	40,000	42,497	-	-	-	-	1%	
5844 After School Services	203,375	216,068	248,392	273,747	286,779	297,865	3%	-11%
5849 Other Student Instructional Services	74,000	-	-	-	-	-	1%	3%
5852 PD Consultants & Tuition	27,925	28,763	29,649	30,627	31,546	32,492	0%	-26%
5854 Nursing & Medical (Non-IEP)	3,156	3,353	3,855	4,248	4,451	4,623	0%	5%
5859 All Other Consultants & Services	71,020	73,151	75,404	77,892	80,229	82,636	1%	-32%
5861 Non Instructional Software	59,000	60,770	62,642	64,709	66,650	68,650	1%	-6%
5865 Fundraising Cost	-	-	-	-	-	-	0%	
5871 District Oversight Fees	39,178	41,764	48,049	52,966	55,659	57,985	1%	7%
5872 Special Education Fees (SELPA)	65,610	68,030	75,871	80,945	82,328	83,020	1%	11%
5881 Intra-Agency Fees	606,259	635,000	662,607	691,872	721,511	743,157	9%	29%
5895 Bad Debt Expense	-	-	-	-	-	-	0%	
5898 Uncategorized Expense	7,710	8,191	9,416	10,377	10,871	11,292	0%	5%
5899 All Other Expenses	8,600	8,858	9,131	9,432	9,715	10,007	0%	0%
5911 Office Phone	18,622	19,784	22,744	25,065	26,258	27,274	0%	5%
5913 Mobile Phone	21,440	22,083	22,764	23,515	24,220	24,947	0%	3%
5921 Internet	23,484	24,189	24,934	25,756	26,529	27,325	0%	3%
5923 Website Hosting	3,867	3,983	4,105	4,241	4,368	4,499	0%	3%

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
Prepared by ExED. For use by ExED and ExED clients only. © 2024 ExED

	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
5931 Postage & Shipping	1,891	1,948	2,008	2,074	2,136	2,200	0%	3%
5999 Other Communications	6,180	6,365	6,561	6,778	6,981	7,191	0%	3%
Total 5000 · Operating Services	**1,754,468**	**1,759,112**	**1,848,822**	**1,963,601**	**2,042,819**	**2,108,836**	**25%**	**-3%**
6000 · Capital Outlay								
6901 Depreciation Expense	765,064	760,775	749,229	740,584	734,334	725,584	11%	-3%
6911 Amortization Expense - Lease Assets	-	-	-	-	-	-	0%	
6912 Amortization Expense - Other	-						0%	
6999 Capital Outlay	-						0%	
Total 6000 · Capital Outlay	**765,064**	**760,775**	**749,229**	**740,584**	**734,334**	**725,584**	**11%**	**-3%**
7000 · Other Outgo								
7438 Interest Expense	145,165	141,523	137,808	134,017	130,151	126,206	2%	0%
Total 7000 · Other Outgo	**145,165**	**141,523**	**137,808**	**134,017**	**130,151**	**126,206**	**2%**	**0%**
TOTAL EXPENSE	**7,124,550**	**7,267,413**	**7,548,013**	**7,828,161**	**7,871,815**	**8,077,114**	**100%**	**0%**
NET INCOME	**(670,535)**	**(703,596)**	**(731,823)**	**(437,160)**	**(426,197)**	**(408,768)**		
	94,529	57,178	17,407	303,424	308,137	316,816		
Beginning Cash Balance	3,645,936	3,392,796	2,345,985	2,107,939	2,161,357	2,258,407		
Cash Flow from Operating Activities								
Net Income	(670,535)	(703,596)	(731,823)	(437,160)	(426,197)	(408,768)		
Change in Accounts Receivable	-							
Prior Year Accounts Receivable	1,369,610	690,721	722,623	771,018	810,483	807,424		
Current Year Accounts Receivable	(690,721)	(722,623)	(771,018)	(810,483)	(807,424)	(1,045,441)		
Change in Due from	-	-	-	-	-	-		
Change in Accounts Payable	(14,096)	(13,391)	(12,721)	(12,085)	(11,481)	(10,907)		
Change in Due to	185,580	(875,376)	-	-	-	-		
Change in Accrued Vacation	-	-	-	-	-	-		
Change in Payroll Liabilities	-	-	-	-	-	-		
Change in Prepaid Expenditures	(63,960)	(6,244)	(6,556)	(6,884)	(7,228)	(7,589)		
Change in Deposits	-	-	-	-	-	-		
Change in Deferred Revenue	(956,904)	-	-	-	-	-		
Change in Other Long Term Assets	10,235	6,989	-	-	-	-		
Change in Other Long Term Liabilities	(6,989)	-	-	-	-	-		
Depreciation Expense	765,064	760,775	749,229	740,584	734,334	725,584		
Cash Flow from Investing Activities								
Capital Expenditures	-	-	-	-	-	-		
Cash Flow from Financing Activities								
Source - Sale of Receivables	-	-	-	-	-	-		
Use - Sale of Receivables	-	-	-	-	-	-		

MONSENOR OSCAR ROMERO CHARTER SCHOOL
Multi-Year Budget Detail
Prepared by ExED. For use by ExED and ExED clients only. © 2024 ExED

	2024-25 Forecast	2025-26	2026-27	2027-28	2028-29	2029-30	2024-25 Percent of Budget	Percent Change, 2023-24 to 2024-25
	0	1	2	3	4	5		
Source - Loans	-	-	-	-	-	-		
Use - Loans	(180,424)	(184,066)	(187,781)	(191,571)	(195,438)	(199,383)		
Ending Cash Balance	3,392,796	2,345,985	2,107,939	2,161,357	2,258,407	2,119,326		
Month with Lowest Ending Cash Balance	Oct: $3,317,414	Oct: $2,188,669	Mar: $1,969,852	Oct: $1,954,592	Sep: $2,100,676	Sep: $2,100,676		
5% Reserve Goal	356,227	363,371	377,401	391,408	393,591	403,856		
Operating Income	94,529	57,178	17,407	303,424	308,137	316,816		
Operating Income, Excluding Non-cash Lease Expense	94,529	57,178	17,407	303,424	308,137	316,816		
EBITDA	239,693	198,701	155,214	437,441	438,287	443,022		
Net Income as a Percent of Expenses	-9.4%	-9.7%	-9.7%	-5.6%	-5.4%	-5.1%		
Ending Cash as a Percent of Expenses	47.6%	32.3%	27.9%	27.6%	28.7%	26.2%		

Coversheet

Review and Approve the Updated Fiscal Policies and Procedures

Section: IV. Items Scheduled For Action
Item: D. Review and Approve the Updated Fiscal Policies and Procedures
Purpose: Vote
Submitted by:
Related Material: 24-08-09 YPICS Fiscal Policies and Procedures (redline).pdf

YPI Charter Schools Inc. (YPICS)
Fiscal Policies & Procedures

Approved ~~06-26-2023~~08/13/2024

Table of Contents

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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.

YPICS has contracted with ExED for various business services including budgeting, financial reporting, and forecasting; accounting and bookkeeping; cash management; CALPADS reporting; and payroll processing and retirement reporting.

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 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 Accounting Associate or Senior Accounting Associate (AA/SAA) assigned to the organization will save the bank statements directly from the online banking system. If online banking is unavailable or ExED does not have access, the organization will make copies of the original statement available to ExED.
- The ExED AA/SAA will prepare the bank reconciliation using ExED's bank reconciliation workbook.

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- 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~~ organization's records 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~~ make the financial records available 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.
- Paper financial records, to the extent that they exist, will be shredded at the end of their retention period and the organization will keep a general record of what was destroyed.
- ~~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. The organization employs various electronic systems and processes to complete the work associated with its fiscal operations (e.g., SpendBridge, Paycom, Nvoicepay). The electronic systems the organization chooses to use may change over time and new electronic systems may be introduced. The organization will configure the electronic systems to ensure they align to the organization's internal controls.

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.

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- 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.
- Reviews and accepts the annual financial audit before submission, when possible, but otherwise no later than by January 31, unless there has been an approved audit extension, in which case the audit will be accepted as soon as possible following completion.Approves the annual financial audit by December 15.
- Appoints someone else to perform the duties of the Executive Director in the case of absence., and/or approves the appointment of someone who has been so assigned by the Executive Director.

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.

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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. ExED will work with the organization's leadership to prepare updated financial statements for presentation to the Governing Board in alignment with the Board's schedule of regular meetings.
- ~~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,

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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~~ accept the audit no later than ~~December~~ January 31~~15~~.
- The audit firm will be responsible for submitting the audit to all reporting agencies no later than December 15, unless an approved audit extension is in place.

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 or designee will review the tax returns before submitting to the Governing Board for ~~final approval~~review prior to ~~May 15~~submission. The tax returns will include an explanation of the method by which the Governing Board receives the returns prior to submission.
- 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: Paycom and 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.

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Procedures:
- Paycom will prepare and file employee W2s by January 31 each year. If this date falls on a Saturday, Sunday, or legal holiday, the deadline will be the next business day.
- Paycom will deposit and file federal, state withholding and state disability taxes and quarterly tax returns.
- ExED will deposit and file state unemployment taxes and quarterly payroll tax reports by the filing deadline.
- For clients who are not members of SEF, Paycom will deposit and file all federal and state taxes and tax returns.
- ~~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.

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- 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 (15th and end of month). Under the supervision of the Executive Director or Chief Operations Officer, ExED will be responsible for processing payroll through a third-party provider.

Time Sheet Preparation & Approval

Policy: For payroll, benefits tracking, and cost allocation purposes, all non-exempt employees are required to record time worked, holidays, and leave taken for each pay period. ~~All employees are required to record time worked, holidays, and leave taken for payroll, benefits tracking, and cost allocation purposes.~~

Procedures:
- Non-exempt ~~Ee~~mployees 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.

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- Each supervisor will review and ~~provide final approval~~Executive Administrator will approve 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. The employee must still complete and submit the timesheet upon return. If no timesheet is submitted, the organization will pay the employee for the best estimate of hours worked and will update to the accurate hours as soon as possible~~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.
- If a payday falls on a holiday or weekend, checks will be issued on the last working day before that weekend or holiday.

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~~ Human Resources Department ~~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 Officer will review electronic timecards within the payroll system to ensure that they are complete and approved for that pay period.
- The ExED 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.
- ExED Associate will process payroll and send the final payroll register for approval by the Executive Director or Chief Operations Officer.
- The ExED Manager or Vice President will submit payroll to the 3rd party payroll provider for check or direct deposit processing.
- If applicable, the 3rd party payroll provider will deliver the payroll package to the organization address on the file one day prior to the check date. Human Resources will be responsible for opening the payroll package, reviewing reports for accuracy, and notifying

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ExED of any missing check. The Human Resources Department will have live checks available for pick up by employees on the check date. Employees have access to pay stubs via Paycom system.

- 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 3rd party payroll provider for check (if applicable) and direct deposit processing.
  - The 3rd 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 unless agreed to by the employee and the organization.

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- 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 $2150,000 (or the current small purchase threshold set by the US Department of Agriculture, if higher) shall follow a competitive bid process. Procurements for the organization's Nutrition Program will follow the policies, procedures and guidelines required under the applicable state or federal nutrition programs.

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. Confidential payee information for employees may be redacted from publicly available documents.
- Purchases of individual items using federal funds, which exceed the threshold set under federal guidelines, will be inventoried appropriately.

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

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list via a search of the System for Award Management (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 Member(s) of the Governing Board, as well as any other employee participating any procurement decision, will abide by all relevant Conflict of Interest laws, including insuring that those with the conflict will excuse themselves from discussions and from voting on the contractPotential 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.

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- 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.
- The organization is responsible for collecting current information relevant to what is required on the Form 1099 and providing it to ExED no later than December 15 each year.
- At the close of the calendar year, ExED will issue a Form 1099 to all independent contractors in accordance with IRS regulations~~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:

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- When receiving tangible goods from a vendor, the Accounts Payable Department will trace the merchandise to the packing list and note any items that were not in the shipment.
- For invoices that are received manually (e.g., via email or mail)
    - The Accounts Payable Department will open and review invoices and bills and will notify the Executive Director or Chief Operations Officer of any unexpected or unauthorized expense.
    - The Accounts Payable Department will code invoices to the correct budget line.
- For electronic invoices that are sent directly from the vendor to the procurement system
    - The procurement system will automatically receive the electronic invoice against the purchase order.
    - The procurement system will copy the coding from the purchase order to the electronic invoice.
    - The procurement system will create an E-Invoice document to reflect the electronic invoice data it received from the vendor.
- Invoices are then routed to the Executive Director or Chief Operations Officer for payment approval.
- ExED will review the invoice for sufficient supporting documentation, verify the coding, and process payment.
- 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.
- ~~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.

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- 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 or added digitally to the check image, if the check was not yet printed.
- Bank Checks will be considered stale dated in alignment with the timeline for Nvoicepay, which is currently 180 days. The organization will provide ExED with direction regarding re-issuing payments for each stale dated item in a timely manner, and will complete any steps required to void the bank check, such as a Stop Payment order with the bank.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 60 180 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 60180-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.

Wire Transfers

Policy: Wire transfers initiated by the organization will be executed upon receipt of appropriate documentation (e.g. vendor invoice, purchase order, packing slip, etc.).

Procedures for organization initiated and executed wire transfers:

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- Someone other than the Executive Director shall prepare all supporting documentation for the wire transfer.
- Executive Director or authorized bank signatory will review all supporting documentation and request the wire transfer to be completed by the bank.
- YPICS will send all documentation to ExED promptly.

Petty Cash

Policy: The Executive Administrator will keep a petty cash box not to exceed $1000. 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 or designee will manage the petty cash fund.
- The Executive Administrator or designee 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 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 $1000.
- When the petty cash balance is low the 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 Operations 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 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.

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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 during the next regular check run following receipt of appropriate and complete documentation~~check within 15 business days of receipt of appropriate and complete documentation~~.
- Employees and volunteers will submit expense reports promptly, and in all cases, within the fiscal year in which the expenses were incurred.
- The organization reserves the right to refuse reimbursement for any inappropriate expenses made or for any expenses which are not submitted with complete documentation within the expected time frames.
  -

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~~lodging when pre-approved by an administrator and the event is more than 50 miles from either the employee's residence or the school site. Overnight lodging during a multi-day conference can be considered for reimbursement when pre-approved. ~~Hotel~~ Lodging 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) for any breakfast, lunch, dinner, or incidental expense for items not included in the fee for the event.

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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 except including transportation from home to airport. For transportation from home to airport employees will be reimbursed at IRS mileage reimbursement rate, the distance traveled shall be reduced by the employee's home-to-office commute distance.
- 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 $15,000 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.

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- The organization is responsible for maintaining compliant inventory lists of all items required under state or federal program guidelines, including items which fall below the capitalization threshold listed above.
  -

Leases

Policy: All contracts that meet the following criteria shall be reported as a lease in accordance with ASC 842:
1. The contract conveys the right to control the use of an identified asset (land, buildings, equipment) for a period of time greater than 12 months in exchange for payment.
2. The net present value (NPV) of the leased asset over the term of the lease, including any options to renew, exceeds the organization's capitalization threshold ($5,000)

Leases are classified as either finance or operating. The lease classification determines the accounting requirements. If the organization is not sure whether a contract contains a lease, it will seek guidance from legal counsel and/or their audit firm to make the determination.

Procedures:

- The Chief Operations Officer will notify ExED of leases that meet the requirements listed above as they arise, but no later than the quarter end, by completing the ExED Lease Data Collection Form. The form assists in determining if a lease is a finance or operating lease.
- ExED will recognize and initially measure all leases as of the lease commencement date by recording a right-of-use asset and a lease liability on the balance sheet.
- To determine the (NPV) of the lease asset, the organization will:
  - use the rate implicit in the lease when readily determinable.
  - In cases where the implicit rate is not readily determinable, employ a risk-free discount rate corresponding to the lease term, referencing SLGS Daily Rate Table for the risk-free determination.
- ExED will record all subsequent entries as required by the type of lease (operating or finance) on a monthly or annual basis.
- Annually, each August the organization will take an inventory of all contracts and work with ExED to be sure that all appropriate contracts have been identified and included when appropriate. A record will be created that indicates that the annual inventory took place and who conducted it.

Loans & Lines of Credit

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

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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.
- Any draw of funds from a Line of Credit shall require written approval from the Executive Director and the Board Treasurer.
-

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
- Cyber Insurance

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 or Coordinator of Human Resources 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 though his/her individual insurance policies.

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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~~5%.~~:~~

- ~~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.

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Coversheet

Review and Approve FY24-25 MORCS Pro Rata Share Payments to LAUSD Automatic Deduction

Section: IV. Items Scheduled For Action
Item: E. Review and Approve FY24-25 MORCS Pro Rata Share Payments to
LAUSD Automatic Deduction
Purpose: Vote
Submitted by:
Related Material:
24-08-08 MORCS @ Berendo MS Pro Rata Share Calculations - SYs 2022-2025.pdf
24-08-08 MORCS @ Berendo MS YPI_ Auto Deduct Letter.pdf

MORCS @ Berendo MS Pro Rata Share - School Years 2022-2025 40 year Lease - Term: 1/7/2019 to 1/6/2059			July 2022 - June 2023	July 2023 - June 2024	July 2024 - June 2025
(A)		Total Sq. Ft. (SF) of Exclusive & 100% Occupied Areas	44,888	44,888	44,888
		Shared Use Area SF	6,598	6,598	6,598
		% of Shared Area	27%	27%	27%
(B)		Total Shared Use Area SF	1,781	1,781	1,781
(F)		Facilities Cost per Building Square Foot	$10.49	$11.18	$13.22
		Annual LAUSD Facilities Excluded Costs per SF Custodial (Buildings) + Utilities+ Information Technology Costs Excluded RRGM excluded after 6/30/23 (Srvcs Paid by Tenant)	$5.35	$9.41	$10.66
(D)		Facilities Cost per Building Square Foot after Excluded Costs Per SF	$5.14	$1.77	$2.56
(W)	(A*D)	**Annual Pro Rata for Exclusive Share Amount**	$ 230,724.32	$ 79,451.76	$ 114,913.28
(X)	(B*F)	Annual Pro Rata for Shared Use Space Amount	$ 18,687.52	$ 19,916.72	$ 23,550.90
(Z)		**Total Annual Pro-Rata Share Charge Due from Charter**	$ 249,411.84	$ 99,368.48	$ 138,464.18
		Total Amount Charter Paid	$ 249,411.84	$ 33,122.84	$ -
		YEAR END REMAINING BALANCE DUE FROM CHARTER	$ (0.00)	$ 66,245.64	$ 138,464.18
		BALANCE DUE FROM CHARTER THROUGH APRIL 2024	$ -	$ 49,684.26	$ -

Monthly Pro Rata Share		
July 2022 - June 2023	July 2023 - June 2024	July 2024 - June 2025
$ 20,784.32	$ 8,280.71	$ 11,538.68

MORCS @ Berendo MS Pro Rata Share Calculations - SYs 2022-2025

Facilities Costs
2022-2023
Pro Rata Share Calculation

LAUSD Campus:	Berendo Middle School	Charter School:	Monsenor Oscar Romero Charter

Exclusive Space Square Footage

Building A - Admin Area	2,908
Building A - Sub-Surface Parking Garage	17,393
Building B - MPR Building	3,245
Building C - Classroom Building	21,342
Total Charter School Exclusive Use Square Footage of	
Enclosed Building Area = A	44,888

Shared Space Calculation

M=	Total Square Footage of Charter Exclusive Use Space	44,888
N=	Total Square Footage of LAUSD Exclusive Use Space	123,375

% of Shared use Space

Total SF of Charter Exclusive Use Space (M)

Total SF of all Charter and LAUSD Exclusive Use SF (M+N)

% = 27%

Pro Rata Share Calculations

A =	44,888	A = Charter School Exclusive Use Square Footage
B =	1,781.46	B = Total Charter School Shared Use Space Building Square Footage Obligation[1]
C =	23,866.85	C = Total Charter School Shared Use Space Outdoor Play Area Square Footage Obligation
D =	$5.14	**D = 2022-2023 Facilities Cost per Building Square Foot less Custodial (building), Utilities & IT [2]**
E =	$0.00	E = 2022-2023 Outdoor Play Area Costs per Land Square Foot [3]
F =	$10.49	F = 2022-2023 Shared Facilities Cost per Building Square Foot

W = A * D	$	230,724.32	W = Charter School Exclusive Use Pro Rata Share Amount
X = B * F	$	18,687.52	X = Charter School Shared Building Use Pro Rata Share Amount
Y = C * E		-	Y = Charter School Shared Outdoor Play Space Use Pro Rata Share Amount

Z = W+X+Y	**$**	**249,411.84**	**Z = TOTAL PRO RATA SHARE CHARGE DUE ANNUALLY FROM CHARTER SCHOOL**
AA = Z/12	**$**	**20,784.32**	**AA = MONTHLY PRO RATA SHARE CHARGE**

(1) Calculation reflects MORCS' shared use of the existing Berendo MS Gymnasium. Subject to change in the future

(2) Facilities Cost are re-calculated on a yearly basis.

(3) At this time LAUSD is not calculating Outdoor Play Space costs. Subject to change in future.

Facilities Costs
2022-2023
Pro Rata Share Calculation

SHARED USE BUILDING SPACE CALCULATION

BUILDING AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %[1]	Charter School Pro-Rata Share
Gymnasium	6,598	27%	1,781.46
Auditorium	10,154	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			1,781.46

SHARED USE OUTDOOR PLAY SPACE CALCULATION

OUTDOOR PLAY AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %*	Charter School Pro-Rata Share
Soccer/Track Area	60,981	27%	16,220.95
Basketball Area	29,558	0%	0.00
Volleyball Area	28,744	27%	7,645.90
Handball/Basketball Area	27,447	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			23,866.85

(1) Calculation reflects MORCS' shared use of the existing Berendo MS Gymnasium. Subject to change in the future

EXHIBIT B
LAUSD Facilities Cost Worksheet for 2022-2023 School Year

NOTES*	DESCRIPTION	TOTAL COSTS	COST PER SQUARE FOOT	TOTAL COST PER CATEGORY
(1) (2)	**Debt Service - interest and principal on COPS**	$16,255,235.05	$0.22	**$0.22**
	Maintenance & Operations			**$7.44**
(1) (2)	Air Filter Tech and Building Engineering	$4,404,442.74	$0.06	
(1) (2)	Pest Management	$2,496,918.66	$0.03	
(1) (2)	Custodial (Buildings)	$153,905,488.89	$2.07	
(1) (2)	Rubbish Removal	$5,688,974.09	$0.08	
(1) (2)	Routine Repairs General Maintenance (RRGM)	$261,929,638.01	$3.53	
(1) (2)	Utilities (Electricity, Water, Gas)	$123,796,695.00	$1.67	
	Safe and Comfortable			**$2.41**
(1) (2)	School Police Services	$52,500,000.00	$0.71	
(1) (2)	Office of Environmental Health & Safety (OEHS)	$6,588,922.20	$0.09	
(1) (2)	Information Technology Division	$119,643,047.00	$1.61	
(3)	**Deferred Maintenance**	$0.00	$0.00	**$0.00**
(1) (2) (4)	**Insurance**	$20,296,324.00	$0.27	**$0.27**
	Grounds Costs			**$0.15**
(1) (5)	Gardening Services	$12,364,467.15	$0.05	
(1) (5)	Landscaping/Tree Trimming	$3,284,047.17	$0.01	
(1) (5)	Custodial (Grounds)	$21,986,498.41	$0.09	
			GRAND TOTAL	*$10.49*
	Excluded Amounts			**$5.35**
	Custodial (Buildings)		$2.07	
	Utilities (Electricity, Water, Gas)		$1.67	
	Information Technology Division		$1.61	
	LAUSD COSTS w/o Excluded Amount(s)			**5.14**
LEGEND	*Total K-12 building square footage and direct support*		74,268,950	
	Footprint for total District buildings		49,155,826	
	Total District grounds square footage		280,805,620	
	Net grounds square footage		231,649,794	

*NOTES:

(1) Calculation of facilities costs based upon actual 2020-21 school year expenses.

(2) Total K-12 building square footage and direct support space

(3) Deferred Maintenance was paid for by bond funds during 2020-21 school year

(4) Includes District's premiums for excess liability, property coverage, boiler & machinery, and property floater

(5) Net grounds square footage = Total District grounds square footage less Footprint for total District buildings

04-01-2022

Facilities Costs
2023-2024 School Year
Pro Rata Share Calculation

LAUSD Campus:	Berendo Middle School	Charter School:	Monsenor Oscar Romero Charter

Exclusive Space Square Footage

Building A - Admin Area	2,908
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Total Charter School Exclusive Use Square Footage of
Enclosed Building Area = A   44,888

Shared Space Calculation

M=	Total Square Footage of Charter Exclusive Use Space	44,888
N=	Total Square Footage of LAUSD Exclusive Use Space	123,375

% of Shared use Space   Total SF of Charter Exclusive Use Space (M)
_____
Total SF of all Charter and LAUSD Exclusive Use SF (M+N)

% =   27%

Pro Rata Share Calculations

A =	44,888	A = Charter School Exclusive Use Square Footage
B =	1,781.46	B = Total Charter School Shared Use Space Building Square Footage Obligation[1]
C =	23,866.85	C = Total Charter School Shared Use Space Outdoor Play Area Square Footage Obligation
D =	$1.77	D = 2023-2024 Facilities Cost per Building Square Foot less Routine Repairs General Maintenance (RRGM), Custodial (building), Utilities & Information Technology [2]
E =	$0.00	E = 2023-2024 Outdoor Play Area Costs per Land Square Foot [3]
F =	$11.18	F = 2023-2024 Shared Facilities Cost per Building Square Foot

W = A * D	$	79,451.76	W = Charter School Exclusive Use Pro Rata Share Amount
X = B * F	$	19,916.72	X = Charter School Shared Building Use Pro Rata Share Amount
Y = C * E		-	Y = Charter School Shared Outdoor Play Space Use Pro Rata Share Amount

Z = W+X+Y	$	**99,368.48**	**Z = TOTAL PRO RATA SHARE CHARGE DUE ANNUALLY FROM CHARTER SCHOOL**
AA = Z/12	$	**8,280.71**	**AA = MONTHLY PRO RATA SHARE CHARGE**
BB = AA * 4	$	**33,122.84**	**BB = AMOUNT CHARTER SCHOOL PAID FOR JULY 2023 - OCTOBER 2023**
CC= AA * 8	$	**66,245.64**	**CC= REMAINING ANNUAL BALANCE**

(1) Calculation reflects MORCS' shared use of the existing Berendo MS Gymnasium. Subject to change in the future

(2) Facilities Cost are re-calculated on a yearly basis.

(3) At this time LAUSD is not calculating Outdoor Play Space costs. Subject to change in future.

Facilities Costs
2023-2024 School Year
Pro Rata Share Calculation

SHARED USE BUILDING SPACE CALCULATION

BUILDING AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %[1]	Charter School Pro-Rata Share
Gymnasium	6,598	27%	1,781.46
Auditorium	10,154	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			1,781.46

SHARED USE OUTDOOR PLAY SPACE CALCULATION

OUTDOOR PLAY AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %*	Charter School Pro-Rata Share
Soccer/Track Area	60,981	27%	16,220.95
Basketball Area	29,558	0%	0.00
Volleyball Area	28,744	27%	7,645.90
Handball/Basketball Area	27,447	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			23,866.85

(1) Based on MORCS indication they will request shared use of the Berendo MS Gymnasium. Subject to change in future.

EXHIBIT B
LAUSD Facilities Cost Worksheet for 2023-2024 School Year

NOTES*	DESCRIPTION	TOTAL COSTS	COST PER SQUARE FOOT	TOTAL COST PER CATEGORY
(1) (2)	**Debt Service - interest and principal on COPS**	$16,374,431.26	$0.22	**$0.22**
	Maintenance & Operations			**$7.94**
(1) (2)	Air Filter Tech and Building Engineering	$4,156,361.26	$0.06	
(1) (2)	Pest Management	$2,561,065.78	$0.03	
(1) (2)	Custodial (Buildings)	$163,591,438.06	$2.20	
(1) (2)	Rubbish Removal	$13,036,852.16	$0.18	
(1) (2)	Routine Repairs General Maintenance (RRGM)	$242,993,167.91	$3.27	
(1) (2)	Utilities (Electricity, Water, Gas)	$163,771,619.95	$2.20	
	Safe and Comfortable			**$2.56**
(1) (2)	School Police Services	$54,090,617.00	$0.73	
(1) (2)	Office of Environmental Health & Safety (OEHS)	$6,674,153.89	$0.09	
(1) (2)	Information Technology Division	$129,732,032.00	$1.74	
(3)	**Deferred Maintenance**	$0.00	$0.00	**$0.00**
(1) (2) (4)	**Insurance**	$21,185,599.00	$0.28	**$0.28**
	Grounds Costs			**$0.18**
(1) (5)	Gardening Services	$14,016,669.49	$0.06	
(1) (5)	Landscaping/Tree Trimming	$3,472,919.91	$0.02	
(1) (5)	Custodial (Grounds)	$23,370,205.44	$0.10	
			GRAND TOTAL	*$11.18*
	Excluded Amounts			**$9.41**
	Custodial (Buildings)		$2.20	
	Utilities (Electricity, Water, Gas)		$2.20	
	Information Technology Division		$1.74	
	Routine Repairs General Maintenance (RRGM)		$3.27	
	LAUSD COSTS w/o Excluded Amount(s)			1.77
LEGEND	Total K-12 building square footage and direct support space		74,372,006	
	Footprint for total District buildings		49,504,706	
	Total District grounds square footage		280,853,971	
	Net grounds square footage		231,349,265	

*NOTES:

(1) Calculation of facilities costs based upon actual 2021-22 school year expenses.

(2) Total K-12 building square footage and direct support space

(3) Deferred Maintenance was paid for by bond funds during 2021-22 school year

(4) Includes District's premiums for excess liability, property coverage, boiler & machinery, and property floater

(5) Net grounds square footage = Total District grounds square footage less Footprint for total District buildings

3-31-2023

Facilities Costs
2024-2025 School Year
Pro Rata Share Calculation

LAUSD Campus:	Berendo Middle School	Charter School:	Monsenor Oscar Romero Charter

Exclusive Space Square Footage

Building A - Admin Area	2,908
Building A - Sub-Surface Parking Garage	17,393
Building B - MPR Building	3,245
Building C - Classroom Building	21,342
Total Charter School Exclusive Use Square Footage of Enclosed Building Area = A	44,888

Shared Space Calculation

M=	Total Square Footage of Charter Exclusive Use Space	44,888	
N=	Total Square Footage of LAUSD Exclusive Use Space	123,375	

% of Shared use Space

$$\frac{\text{Total SF of Charter Exclusive Use Space (M)}}{\text{Total SF of all Charter and LAUSD Exclusive Use SF (M+N)}}$$

% = 27%

Pro Rata Share Calculations

A =	44,888	A = Charter School Exclusive Use Square Footage
B =	1,781.46	B = Total Charter School Shared Use Space Building Square Footage Obligation[1]
C =	23,866.85	C = Total Charter School Shared Use Space Outdoor Play Area Square Footage Obligation
D =	$2.56	D = 2024-2025 Facilities Cost per Building Square Foot less Routine Repairs General Maintenance (RRGM), Custodial (building), Utilities & Information Technology [2]
E =	$0.00	E = 2024-2025 Outdoor Play Area Costs per Land Square Foot [3]
F =	$13.22	F = 2024-2025 Shared Facilities Cost per Building Square Foot

W = A * D	$	114,913.28	W = Charter School Exclusive Use Pro Rata Share Amount
X = B * F	$	23,550.90	X = Charter School Shared Building Use Pro Rata Share Amount
Y = C * E		-	Y = Charter School Shared Outdoor Play Space Use Pro Rata Share Amount

Z = W+X+Y	**$**	**138,464.18**	**Z = TOTAL PRO RATA SHARE CHARGE DUE ANNUALLY FROM CHARTER SCHOOL**
AA = Z/12	**$**	**11,538.68**	**AA = MONTHLY PRO RATA SHARE CHARGE**

(1) Calculation reflects MORCS' shared use of the existing Berendo MS Gymnasium. Subject to change in the future

(2) Facilities Cost are re-calculated on a yearly basis.

(3) At this time LAUSD is not calculating Outdoor Play Space costs. Subject to change in future.

Facilities Costs
2024-2025 School Year
Pro Rata Share Calculation

SHARED USE BUILDING SPACE CALCULATION

BUILDING AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %[1]	Charter School Pro-Rata Share
Gymnasium	6,598	27%	1,781.46
Auditorium	10,154	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			1,781.46

SHARED USE OUTDOOR PLAY SPACE CALCULATION

OUTDOOR PLAY AREA

Area, per Exhibit A (Shared Use Agreement)	Area Square Footage	Charter %*	Charter School Pro-Rata Share
Soccer/Track Area	60,981	27%	16,220.95
Basketball Area	29,558	0%	0.00
Volleyball Area	28,744	27%	7,645.90
Handball/Basketball Area	27,447	0%	0.00
Total Charter School Shared Use Space Building Square Footage Obligation			23,866.85

(1) Calculation reflects MORCS' shared use of the existing Berendo MS Gymnasium. Subject to change in the future

EXHIBIT B
LAUSD Facilities Cost Worksheet for 2024-2025 School Year

NOTES*	DESCRIPTION	TOTAL COSTS	COST PER SQUARE FOOT	TOTAL COST PER CATEGORY
(1) (2)	**Debt Service - interest and principal on COPS**	$14,819,374.69	$0.20	**$0.20**
	Maintenance & Operations			**$8.92**
(1) (2)	Air Filter Tech and Building Engineering	$818,730.25	$0.01	
(1) (2)	Pest Management	$2,669,125.62	$0.04	
(1) (2)	Custodial (Buildings)	$176,802,936.13	$2.39	
(1) (2)	Rubbish Removal	$19,175,690.45	$0.26	
(1) (2)	Routine Repairs General Maintenance (RRGM)	$303,041,462.20	$4.09	
(1) (2)	Utilities (Electricity, Water, Gas)	$157,668,349.66	$2.13	
	Safety and Comfort			**$2.96**
(1) (2)	School Police Services	$60,488,115.40	$0.82	
(1) (2)	Office of Environmental Health & Safety (OEHS)	$6,503,706.52	$0.09	
(1) (2)	Information Technology Division	$151,664,307.85	$2.05	
(3)	**Deferred Maintenance**	$0.00	$0.00	**$0.00**
(1) (2) (4)	**Insurance**	$69,228,020.65	$0.94	**$0.94**
	Grounds Costs			**$0.20**
(1) (5)	Gardening Services	$15,881,497.98	$0.07	
(1) (5)	Landscaping/Tree Trimming	$3,874,899.52	$0.02	
(1) (5)	Custodial (Grounds)	$25,257,562.30	$0.11	
			GRAND TOTAL	*$13.22*
LEGEND	*Total K-12 building square footage and direct support space*		74,007,838	
	Footprint for total District buildings		48,897,777	
	Total District grounds square footage		280,806,055	
	Net grounds square footage		231,908,278	

*NOTES:

(1) Calculation of facilities costs based upon actual 2022-23 school year expenses

(2) Total K-12 building square footage and direct support space

(3) Deferred Maintenance was paid for by bond funds during 2022-23 school year

(4) Includes District's premiums for excess liability, property coverage, boiler & machinery, and property floater

(5) Net grounds square footage = Total District grounds square footage less Footprint for total District buildings

4-1-2024

	Sent Via Email

Yvette King-Berg
YPI Charter Schools, Inc.
10660 White Oak Avenue
Granada Hills, CA 91344

RE: Pro Rata Share Charges and Payment Options

Dear Charter School Operator,

Pursuant to the Charter School Lease and Joint Use Agreement dated May 11, 2016 ("Use Agreement") by and between the Los Angeles Unified School District ("District") and YPI Charter Schools, Inc., as the operator of the Monseñor Oscar Romero Charter School ("Charter School"), Charter School is obligated to pay a Pro Rata Share Charge to the District   related to its use of Berendo Middle School ("School Site") in the 2024-25 school year.   According to your e-mail dated April 22, 2024, it is our understanding that Charter School elects to have its Pro Rata Share Charge deducted from Charter School's revenue source. Please execute the attached form so we may set up your requested deduction. The District will notify you when the deduction has been established and until then, you will be required to continue to make payment by check.

Should you have any questions regarding this letter, please contact the Real Estate Charter team at realestate-charter@lausd.net or 213-241-6785.

Sincerely,

Albert J. Grazioli, Jr.
Director of Real Estate & Business Development

Encl.

c: Jose Cole-Gutierrez
      Marla Willmott
      Jeanette Borden
      Karen Tandoc
      Ron Morris

ELECTION FOR PAYMENT OF PRO RATA SHARE CHARGE
2024-25 School Year

YPI Charter Schools, Inc.
10660 White Oak Avenue
Granada Hills, CA 91344

In lieu of delivering a check to the Los Angeles Unified School District ("District") for its Pro Rata Share Charge by the 1st day of each month, Charter School elects to have its Pro Rata Share Charge deducted and authorizes the District to automatically deduct from Charter School's revenue source allocation, including in lieu of property taxes, an amount equal to its monthly Pro Rata Share Charge. This election shall remain in effect until revoked in writing by Charter School and such revocation delivered to the District.

By signing below, I represent that I have the authority to make the foregoing election on behalf of Charter School.

_____
Charter School Name

_____   _____
Name   Title

_____   _____
Signature   Date

Coversheet

Review and Approval of the FY24-25 BCCHS Prop 39 Alternative Agreement

Section: IV. Items Scheduled For Action
Item: F. Review and Approval of the FY24-25 BCCHS Prop 39 Alternative Agreement
Purpose: Vote
Submitted by:
Related Material: 24-08-08 Bert Corona Charter High School 24-25 Alt. Agreement.pdf

LOS ANGELES UNIFIED SCHOOL DISTRICT
Office of the Chief Strategy Officer

333 S. Beaudry Ave., 24th Floor
Los Angeles, CA 90017

Office: (213) 241-4299

ALBERTO M. CARVALHO
Superintendent

VERONICA ARREGUIN
Chief Strategy Officer

August 8, 2024

Yvette King-Berg
Executive Director
Bert Corona Charter High School
12513 Gain Street
Pacoima, CA 91331

VIA E-MAIL
ykingberg@ypics.org

**RE: PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE
          AGREEMENT**

Dear Charter School Operator,

The Los Angeles Unified School District ("District") has agreed to enter into this alternative agreement, pursuant to California Code of Regulations, title 5, section 11969.1, subdivision (b), with YPI Charter Schools, Inc ("YPI"), operating that charter school known as Bert Corona Charter High ("Charter School"), in connection with Charter School's November 1, 2022 facilities request for the 2023-24 school year and Charter School's November 1, 2023 Proposition 39 facilities request for the 2024-25 school year.

1.   Allocation of Space for the 2023-24 School Year

Related to Charter School's November 1, 2022 Proposition 39 facilities request, YPI (on behalf of Charter School) has agreed to accept the District's offer of the following space at the Charles Maclay Middle School campus ("Maclay") for the 2023-24 school year:

- Charter School's exclusive use of:
    - Nine (9) teaching stations (rooms 39, 44, 45, 46, 47, CS10, CS11, CS12, and CS13),
    - Three (3) special education spaces (rooms 37A, 38A and CS9), and
    - One (1) administrative office (room CS14/CS14A/CS14B/CS14C/CS14D);

- Charter School had shared use of the student restrooms located in the gym (space IDs 25545 and 27756) and next to classroom 37 (space IDs 29043 and 29041), each allocated at Charter School's maximum shared use space percentage. Charter School had shared use of the student restrooms located next to classroom CS13 (space IDs 227268 and 227267), and faculty restrooms in main office (space ID 260143) and CS13 (space ID 264713), all with 100% allocation to Charter School. Charter School was offered shared use access to all student and faculty restrooms at Maclay but opted to have shared use of the aforementioned restrooms only. Except as specified herein, Charter School did not have shared use of any other restrooms at Maclay; and

PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT
YPI Charter Schools / Bert Corona Charter High School
August 8, 2024
Page 2 of 6

- Charter School had access to the shared use of other non-teaching station space at Maclay, with exception to the college and career center, computer lab, faculty lounge/dining area, library, parent center, garden/agriculture, outdoor dining, and quad, pursuant to the terms and requirements outlined in the Single-Year Co-Location Charter School Facilities Use Agreement for the 2023-24 school year that Charter school executed on or about April 28, 2023 ("2023-24 Use Agreement"), as may be amended by written agreement between the parties. The terms of this alternative agreement fully set forth all of Charter School's exclusive use and shared use spaces at Maclay for the 2023-24 school year.

The District will provide Charter School an amendment to the 2023-24 Use Agreement ("Amendment to 2023-24 Use Agreement") shortly, reflecting the revisions to Charter School's shared use spaces set forth above and its Pro Rata Share Charge. YPI (on behalf of Charter School) will execute and return the Amendment to 2023-24 Use Agreement within seven (7) calendar days of receiving it from the District and will comply with all of its terms, including, but not limited to, the terms regarding payment of the Pro Rata Share Charge.

2. Allocation of Space for the 2024-25 School Year

Related to Charter School's November 1, 2023 Proposition 39 facilities request, YPI (on behalf of Charter School) has agreed to accept the District's offer of the following space at Maclay for the 2024-25 school year:

- Charter School's exclusive use of:
  - Ten (10) teaching stations (rooms 38A, 39, 44, 45, 46, 47, CS10, CS11, CS12, and CS13),
  - Two (2) special education spaces (rooms 37A and CS9), and
  - One (1) administrative office (room CS14/CS14A/CS14B/CS14C/CS14D);

- Charter School will have shared use of the student restrooms located in the gym (space IDs 25545 and 27756) and next to classroom 37 (space IDs 29043 and 29041), each allocated at Charter School's maximum shared use space percentage. Charter School will have shared use of the student restrooms located next to classroom CS13 (space IDs 227268 and 227267), and faculty restrooms in main office (space ID 260143) and CS13 (space ID 264713), all with 100% allocation to Charter School. Charter School was offered shared use access to all student and faculty restrooms at Maclay but opted to have shared use of the aforementioned restrooms only. Except as specified herein, Charter School will not have shared use of any other restrooms at Maclay; and

- Charter School will have access to the shared use of other non-teaching station space at Maclay, with exception to the college/career center, computer lab, faculty lounge/dining room, library, parent center, garden/agriculture, handball walls, outdoor dining and quad, pursuant to the terms and requirements outlined in the District's standard Single-Year Co-Location Charter School Facilities Use Agreement for the

PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT
YPI Charter Schools / Bert Corona Charter High School
August 8, 2024
Page 3 of 6

2024-25 school year ("2024-25 Use Agreement") that the District will provide to Charter School shortly. The terms of this alternative agreement fully set forth all of Charter School's exclusive use and shared use spaces at Maclay for the 2024-25 school year, and Charter School will not occupy any other spaces.

YPI (on behalf of Charter School) will execute and return the 2024-25 Use Agreement within seven (7) calendar days of receiving it from the District and will comply with all of its terms, including, but not limited to, the terms regarding payment of the Pro Rata Share Charge.

3. Preparing Space for Occupancy

Although the District will proceed in good faith to complete all associated work (e.g., separation of the intrusion alarm/PA system for exclusive use spaces, re-keying, etc.), if any, at Maclay as soon as reasonably possible, YPI (on behalf of Charter School) agrees to waive all legal claims against the District based on any potential failure to timely complete the work at least ten (10) working days before Charter School's first day of instruction for the 2023-24 and 2024-25 school years. The District will make every reasonable attempt to work with Charter School so as not to interrupt Charter School's operations. YPI (on behalf of Charter School) acknowledges, however, that executing all work necessary for Charter School may cause some disruptions and will work with the District to minimize such impacts.

4. Payment Obligations

This alternative agreement does not release, waive, or otherwise impact in any manner YPI's existing obligations (on behalf of Charter School) to pay the District any and all outstanding amounts due and owing or will become due and owing, for past, present, or future school years, for (a) the Pro Rata Share Charge, (b) Charter School's "after hours" use of District facilities, (c) Charter School's summer occupancy at District facilities (if any), (d) reimbursement obligations for over-allocated space (if any), and/or (e) any other payment obligations Charter School may incur (or have already incurred). Nothing in this alternative agreement shall diminish or otherwise alter any of the District's existing legal rights to all outstanding amounts due and owing by YPI (on behalf of Charter School), including reimbursement obligations for over-allocated space for any past, present, or future school years.

5. Collaboration with the District

As a material term of this alternative agreement, Charter School agrees to collaborate in good faith with the District, including, but not limited to, Charter Schools Division, Community Relations, Region North, the Board office, and Maclay administrators, regarding community engagement/outreach (such as attending and participating in community meetings) to address questions, concerns and other issues related to the co-location throughout the term of Charter School's occupancy of the facilities at Maclay. In addition, Charter School's principal and/or designated representative agree to meet with Maclay's principal and/or designated representative

PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT
YPI Charter Schools / Bert Corona Charter High School
August 8, 2024
Page 4 of 6

at least once per quarter, as facilitated by Region North, to mutually address issues related to the ongoing co-location and shared use of the Maclay facilities.

6. Reporting ADA

As an additional material term of this alternative agreement, YPI (on behalf of Charter School) agrees to comply with all applicable laws and regulations relating to Charter School's reporting of ADA data to the District for the 2023-24 and 2024-25 school years. Charter School agrees to record and track student attendance, including Charter School's in-district and total ADA and in-district and total classroom ADA by school site (i.e., at Maclay and any other location(s) at which Charter School will operate), and to maintain records documenting such data. Charter School agrees that, upon the District's request, it will report such data and provide supporting records to the District.

7. Reimbursement Obligations for Over-Allocated Space

Charter School remains subject to potential reimbursement obligations for over-allocated space in the 2023-24 and 2024-25 school years pursuant to California Code of Regulations, title 5, section 11969.8. For purposes of determining whether space is considered to be over-allocated in accordance with California Code of Regulations, title 5, section 11969.8, and for purposes of determining whether fees may be assessed for facilities-related services due to resulting increased impacts and costs as stated in section 9 of Exhibit C to the applicable Use Agreement, Charter School's projected in-district classroom ADA on which the facility allocation is based for the 2023-24 school year is 184.21, and for the 2024-25 school year is 203.32. (Note: No in-district classroom ADA from any locations operated by Charter School other than Maclay shall be included when determining potential reimbursement obligations for over-allocated space.)

8. Releases

As a result of this alternative agreement, YPI (on behalf of Charter School) does not challenge the District's compliance with Proposition 39 for the 2023-24 or 2024-25 school years. YPI (on behalf of Charter School) fully, finally, and without limitation, releases, waives, covenants not to sue, and forever discharges the District from any and all past, present, and future rights, claims, obligations, cross-claims, counter-claims, demands, liabilities, actions, causes of action whether in law or in equity, suits, rights of indemnity (legal and equitable), defenses, damages, losses, attorneys' fees, costs, expenses, consultant and expert fees, interest, penalties, and compensation, of whatever nature, known or unknown, fixed or contingent, suspected or unsuspected, that YPI and/or Charter School now have, or may ever have, against the District that arise out of, or are in any way related to, the District's Proposition 39 compliance for the 2023-24 and 2024-25 school years, or any previous school years. YPI (on behalf of Charter School) acknowledges that it is aware of, and familiar with, section 1542 of the California Civil Code, which states: "A general release does not extend to claims that the creditor or releasing party does not know or suspect to exist in his or her favor at the time of executing the release and that, if known by him or her, would have materially affected his or her settlement with the debtor or released party." With full

PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT
YPI Charter Schools / Bert Corona Charter High School
August 8, 2024
Page 5 of 6

awareness and understanding of this provision, YPI (on behalf of Charter School) waives and relinquishes any and all rights and benefits it may have under section 1542 of the California Civil Code, or common law principles to the same or similar effect. In connection with such waiver and relinquishment, YPI (on behalf of Charter School) hereby acknowledges that it may hereinafter discover claims or facts in addition to or different from those which it now knows and/or believes to exist with respect to the foregoing, but that it hereto intends to and hereby does fully, finally, and forever waive and release all of the disputes and differences against the District, whether known or unknown, suspected or unsuspected, fixed or contingent which concern, arise out of, or are in any way connected with the foregoing.

9. "One-Year Only" Arrangement

YPI (on behalf of Charter School) hereby acknowledges that Charter School's occupancy of the District's facilities identified herein for each of the 2023-24 and 2024-25 school years does not create any obligation for the District to offer or allocate, or any expectation by YPI or Charter School to receive, any of these same spaces for Charter School's use in subsequent school years. In other words, this is a "one-year only" arrangement for each of the 2023-24 and 2024-25 school years.

10. Alternative Agreement Supersedes

This alternative agreement supersedes: (a) the District's March 31, 2023 and April 1, 2024 Final Notifications of Space Offered to the Charter School pursuant to California Code of Regulations, title 5, section 11969.9, subdivision (h), for the 2023-24 and 2024-25 school years, respectively; and (b) Charter School's written notifications to the District whether or not it intends to occupy the offered space for the 2023-24 and 2024-25 school years pursuant to California Code of Regulations, title 5, section 11969.9, subdivision (i) (if any), all of which are hereby null and void.

11. Expiration

PLEASE NOTE: This alternative agreement must be signed by an authorized representative of YPI on behalf of Charter School and **returned via email (prop39@lausd.net) to the District within seven (7) calendar days of the date of this communication**. Failure to do so will automatically result in the District's withdrawal of its willingness to enter into this alternative agreement. Electronic signatures and/or signature pages transmitted by facsimile and/or electronic mail shall be treated as originals.

Please confirm YPI's acknowledgement, on behalf of Charter School, of the terms of this alternative agreement by signing in the space below and returning this document.
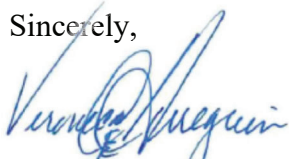
PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT
YPI Charter Schools / Bert Corona Charter High School
August 8, 2024
Page 6 of 6

Sincerely,

Veronica R. Arreguin
Chief Strategy Officer

c: Alberto M. Carvalho
    José Cole-Gutiérrez
    Marla Willmott
    Jeanette Borden
    Daniel Hwang
    Valentina Cardenas

RE: PROPOSITION 39 REQUEST FOR FACILITIES ALTERNATIVE AGREEMENT

By signing below, I represent that I have the authority to enter into this Proposition 39 request for facilities alternative agreement and confirm YPI's acceptance on behalf of Charter School.

Name	Title
Signature	Date

Coversheet

Review and Approve Contract for Curriculum Associates

Section: IV. Items Scheduled For Action
Item: G. Review and Approve Contract for Curriculum Associates
Purpose: Vote
Submitted by:
Related Material: 24-07-24 Curriculum Associates Quote ID 375386.2.pdf

Curriculum Associates®

Prepared For:

Kevin Myers
YPI Charter Schools
9400 Remick Ave,
Pacoima, CA 91331

7/9/2024

Dear Kevin Myers,

Thank you for requesting a price quote from Curriculum Associates. The chart below provides a summary of the products and i-Ready Partner Services included. If you have any questions or would like any changes, please contact us.

Implementation Starting: 2024-2025   Quote ID: 375386.2   Quote Valid through: 12/31/2024

Product	List Price	Net Price
i-Ready Classroom	$26,320.00	$16,762.00
i-Ready	$28,220.00	$26,809.00
Ready	$10,200.00	$8,670.00
Toolbox	$4,720.00	$4,012.00
Professional Learning	$5,400.00	$4,400.00
i-Ready Partners Services	$4,000.00	$0.00

i-Ready Partners Services Includes:
- *Initial Implementation Services: Provisioning, Initial Rostering, Hosting, Technology Assessment*
- *Implementation Management: Partner Success Manager You Know On A First Name Basis, Implementation Guidance, Realtime Achievement Data After Every Assessment, Ongoing Data Management*
- *Staff Development Consultation and Resources: Consultative services to help you plan and make the most of Professional Learning sessions; Access to Online Educator Learning (OEL) Digital Courses, and i-Ready Central Self-Service Resources*
- *Technical Support: Proactive Network Monitoring & Issue Notification, Annual Health Check, Technical Support*

List Total:	$78,860.00
Savings:	$18,207.00
Shipping/Tax/Other:	$3,270.47
Total:	**$63,923.47**

Thank you again for your interest in Curriculum Associates.

Sincerely

Kristin McGinty
(949) 226-2025
kmcginty@cainc.com

Please submit this quote with your purchase order

Curriculum Associates, 153 Rangeway Road, North Billerica MA 01862-2013
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Quote ID: 375386.2   Date: 7/9/2024   Quote Valid through: 12/31/2024

Prepared For:
Kevin Myers
YPI Charter Schools
9400 Remick Ave,
Pacoima, CA 91331
mrmyers@coronacharter.org
8188345805

Your Representative:
Kristin McGinty
(949) 226-2025
kmcginty@cainc.com

Bert Corona Charter MS 9400 Remick Ave, Pacoima, CA 91331

Total Building Enrollment: 349, Grade Range: 5 - 8

Product Name	Grade	Item #	Qty	List Price	Net Price	Total
Online Educator Learning Platform Site License Including Educator Prep Series (Compliments Onsite and Virtual Professional Development)	Multiple	28024.0	1	$500.00	$0.00	$0.00
Professional Learning Session (up to 6 hours) AY 24-25	Multiple	38557.0	1	$2,200.00	$2,200.00	$2,200.00
i-Ready Classroom 2020 Mathematics Student Worktext with Digital Access Grade 5 1 Year	5	25849.0	10	$29.00	$24.65	$246.50
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 6 1 Year	6	28033.0	120	$29.00	$24.65	$2,958.00
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 7 1 Year	7	28034.0	110	$29.00	$24.65	$2,711.50
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 8 1 Year	8	28035.0	110	$29.00	$24.65	$2,711.50
i-Ready Classroom 2020 Common Core Mathematics Teacher Digital Access (English and Spanish) Volume 1 + 2 Grade K-8 1 Year	K-8	26039.0	10	$300.00	$0.00	$0.00
i-Ready Partners Core Mathematics Support - Provisioning + Tech Support + Hosting + Data Management + Implementation Planning + Data Reviews + and Check ins 1 Year	Multiple	27034.0	1	$2,000.00	$0.00	$0.00
i-Ready Assessment and Personalized Instruction Math and Reading Site License 201-350 Students 1 Year	Multiple	15002.0	1	$14,110.00	$13,404.50	$13,404.50
Teacher Toolbox Access Reading + Writing Per Site 201-350 students 1 Year	Multiple	28346.0	1	$2,360.00	$2,006.00	$2,006.00
Ready Common Core Reading Instruction Grade 5 Student Book (2016)	5	16238.0	10	$15.00	$12.75	$127.50
Ready Common Core Reading Instruction Grade 6 Student Book (2014)	6	14553.0	120	$15.00	$12.75	$1,530.00
Ready Common Core Reading Instruction Grade 7 Student Book (2014)	7	14554.0	110	$15.00	$12.75	$1,402.50
Ready Common Core Reading Instruction Grade 8 Student Book (2014)	8	14555.0	110	$15.00	$12.75	$1,402.50
					Subtotal:	$30,700.50
					Shipping:	$401.62
					Tax:	$1,281.73
					School Subtotal:	$32,383.85

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Monsenor Oscar Romero CS 2670 W 11th St, Los Angeles, CA 90006

Total Building Enrollment: 276, Grade Range: 6 - 8

Product Name	Grade	Item #	Qty	List Price	Net Price	Total
Online Educator Learning Platform Site License Including Educator Prep Series (Compliments Onsite and Virtual Professional Development)	Multiple	28024.0	1	$500.00	$0.00	$0.00
Professional Learning Session (up to 6 hours) AY 24-25	Multiple	38557.0	1	$2,200.00	$2,200.00	$2,200.00
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 6 1 Year	6	28033.0	110	$29.00	$24.65	$2,711.50
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 7 1 Year	7	28034.0	110	$29.00	$24.65	$2,711.50
i-Ready Classroom 2021 Mathematics Student Worktext with Digital Access Grade 8 1 Year	8	28035.0	110	$29.00	$24.65	$2,711.50
i-Ready Classroom 2020 Common Core Mathematics Teacher Digital Access (English and Spanish) Volume 1 + 2 Grade K-8 1 Year	K-8	26039.0	12	$300.00	$0.00	$0.00
i-Ready Partners Core Mathematics Support - Provisioning + Tech Support + Hosting + Data Management + Implementation Planning + Data Reviews + and Check ins 1 Year	Multiple	27034.0	1	$2,000.00	$0.00	$0.00
i-Ready Assessment and Personalized Instruction Math and Reading Site License 201-350 Students 1 Year	Multiple	15002.0	1	$14,110.00	$13,404.50	$13,404.50
Teacher Toolbox Access Reading + Writing Per Site 201-350 students 1 Year	Multiple	28346.0	1	$2,360.00	$2,006.00	$2,006.00
Ready Common Core Reading Instruction Grade 6 Student Book (2014)	6	14553.0	110	$15.00	$12.75	$1,402.50
Ready Common Core Reading Instruction Grade 7 Student Book (2014)	7	14554.0	110	$15.00	$12.75	$1,402.50
Ready Common Core Reading Instruction Grade 8 Student Book (2014)	8	14555.0	110	$15.00	$12.75	$1,402.50
					Subtotal:	$29,952.50
					Shipping:	$378.66
					Tax:	$1,208.46
					School Subtotal:	$31,539.62

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Total

List Total:	$78,860.00
Savings:	$18,207.00
Merchandise Total:	$60,653.00
Voucher/Credit:	$0.00
Estimated Tax:	$2,490.19
Estimated Shipping:	$780.28
Total:	**$63,923.47**

Special Notes

Math teacher materials gratis at up to 1:25 ratio (addt'l access paid). Shipping included in math student bundle price. All i-Ready purchases require PL.
5% discount applied to i-Ready based on scope of quote.
15% i-Ready Partnership Discount applied to Toolbox and Ready products contingent upon purchase of i-Ready.

F.O.B.: N. Billerica, MA 01862
Shipping: Shipping based on MDSE total
Terms: Net 30 days, pending credit approval
Fed. ID: #26-3954988

<p style="text-align:center; color:red;">Please submit this quote with your purchase order</p>

Y2

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Curriculum Associates®

Information on Professional Learning Sessions and COVID-19

Protecting the health and safety of the educators we serve and their students, as well as the health and safety of our employees, is of paramount importance to Curriculum Associates. While it is our preference to deliver PL sessions in person, circumstances related to COVID-19 may require us to provide sessions virtually instead. Curriculum Associates' policy is to only provide PL sessions in person where one of our employees can reach the session site by car and where adequate safety measures are in place to protect the health of our session leaders and participants. Curriculum Associates reserves the right to switch any session from in-person to virtual if we cannot reach a session site by car, if adequate safety measures cannot be put in place, or if Curriculum Associates determines that it would otherwise put it employees at risk to provide an in-person session.

If your school or district will not permit visitors at the time of a scheduled session, Curriculum Associates would be happy to provide an equivalent live, virtual session via videoconference. Similarly, Curriculum Associates will comply with your school or district's health and safety requirements regarding on-site visitors if we are given adequate advance notice. Our PL Operations team will work with school or district personnel to hold sessions in a manner that protects the safety of educators and your school community as well as Curriculum Associates employees.

We are pleased to be able to serve you in these challenging times and look forward to providing productive learning sessions to your staff. Any questions regarding scheduling in-person or virtual training sessions should be directed to pdoperations@cainc.com.

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Thank you for your interest in Teacher Toolbox! Teacher Toolbox is a digital collection of instructional materials, designed to support teachers in delivering research-based instruction, remediation, and enrichment to students in Grades K–8.

Your Teacher Toolbox subscription provides access to Teacher Toolbox content for Grades K–8. During this time, educators may use Teacher Toolbox materials during whole class and small group instruction, for individual assignments, and may post student-facing Teacher Toolbox PDFs on a password-protected learning management system (LMS). Please be aware that files expire on June 30 of each year for purposes of Teacher Toolbox maintenance and updates. If you add files to an LMS, this expiration date may require that you re-load these files after this date.

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◼ i-Ready® Partners

Unparalleled Service and Educator Support

The *i-Ready Partners* team was born from our core value: the quality of our services is as important as the quality of our products. Know that when you implement our programs, your local *i-Ready Partners* will be there to support your team every step of the way.

Service Components

Our *i-Ready Partners* team is tasked with helping you implement our programs to meet ambitious district goals. *i-Ready Partners* support includes:
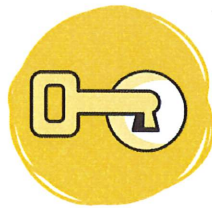
- **An Account Manager You Know on a First-Name Basis:** Dedicated account managers are your point of connection to a powerful network of *i-Ready* experts focused on making your implementation successful.

- **Consultative Professional Development Planning:** Tailored professional development plans ensure that PD is tied to your implementation goals and that educators are equipped to optimize the use of our programs from day one.

- **Real-Time Achievement Data after Every Assessment:** Detailed student achievement analytics to empower data-driven practices in classrooms.

- **Educational Consultants to Help You Know What's Coming Next:** Educational consultants to keep you up to speed on our latest research, development, and best practices.

- **Technical Support and Health Checks:** Proactive support that anticipates and heads off issues before they start—and is there for you should they arise.

| Account Management | Professional Development | Educational Consultants | Achievement Analytics | Technical Support |

Your *i-Ready* Partners Team

Dedicated to helping you implement *i-Ready* programs and achieve your district goals

Curriculum Associates

Curriculum Associates®

Placing an Order

Email: Orders@cainc.com
Fax: 1-800-366-1158
Mail:
ATTN: CUSTOMER SERVICE DEPT.
Curriculum Associates LLC
153 Rangeway Rd
North Billerica, MA 01862-2013

Please visit CurriculumAssociates.com for more information about placing orders or contact CA's customer service department (1-800-225-0248) and reference quote number for questions.
Please attach quote to all signed purchase orders.
If tax exempt, please submit a valid exemption certificate with PO and quote in order to avoid processing delays. Exemption certificates can also be submitted to exempt@cainc.com.

Shipping Policy

Unless otherwise noted, shipping costs are calculated as follows:

Order Amount	Freight Amount
$74.99 or less	Max charge of $12.75
$75.00 to $999.99	12% of order
$1,000 to $4,999.99	10% of order

Order Amount	Freight Amount
$5,000.00 to $99,999.99	9% of order
$100,000 and more	7% of order

Please contact your local CA representative or customer service (1-800-225-0248) for expedited shipping rates. The weight limit for an expedited order is 500lbs.

The enhanced shipping and handling services listed below are available upon request subject to the availability of our carrier partners. Please notify us of these delivery requests prior to submitting your PO so that we can include the service on your quote appropriately:

- Interior Location Delivery $50/shipment location
- White Glove Delivery Service $350/shipment location

If our carrier partners are unable to deliver to the location instructed on the PO or you need to change the time or location of delivery, one or more of the following fees may be applicable:

- Delivery Address Change $100/shipment location
- Freight Storage $150/day/shipment location
- Freight Carrier Redelivery $100/shipment location

Unless otherwise expressly indicated, the shipping terms for all deliveries is FOB CA's Shipping Point (whether to a CA or third party facility). Risk of loss and title is passed to purchaser upon transfer of the goods to carrier, standard shipping charges (listed above) are added to the invoice or included in the unit price unless otherwise specified.

Supply chain challenges outside of Curriculum Associates' control may impact inventory availability for print product. We recommend submission of purchase orders as soon as possible to help ensure timely delivery.

Payment Terms

Payment terms are as follows:
- With credit approval: Net 30 days
- Without credit approval: payment in full at time of order
- Accounts must be current before subsequent shipments are made

To ensure payment processing is timely and environmentally conscious, CA encourages ACH payments. If you would like to pay via ACH, please request remittance information by emailing AR@cainc.com.
Please send any payment notifications to payments@cainc.com. Credit card payments are only accepted for purchases under $50,000.

Invoice Receipt Preference

CA is pleased to offer electronic invoice delivery. Electronic invoice delivery allows CA to deliver your invoice in a timely and environmentally friendly manner. To request electronic invoice delivery please contact the CA Accounts Receivable team at **invoices@cainc.com** or by fax (1-800-366-1158). Please reference your quote number, provide a valid email address where the invoice should be directed, and indicate you would like to opt into electronic invoice delivery.

Terms of Service

Customer's use of i-Ready® shall be subject to the i-Ready Terms and Conditions of Use, which can be found at i-ready.com/support. Customer's professional-learning sessions will expire two years following the date of your purchase order or the implementation year noted on your quote, whichever comes first and are subject to the Professional Learning Terms of Service, which can be found at i-ready.com/support.

Return Policy

For any non-print products - your subscription may be terminated and you may request a pro-rata refund within 90 days of license start date. After 90 days, your non-print products purchase shall be final and no refunds are available. Except for materials sold on a non-refundable basis, purchaser may return, at purchaser risk and expense, purchased print materials with pre-approval from CA's Customer Service department within 12 months of purchase. Please examine your order upon receipt. Before returning material, call CA's Customer Service department (1-800-225-0248 option 2) for return authorization and documentation. When returning material, please include your return authorization number and the return form that will be provided to you by CA's Return department. We do not accept returns on unused i-Ready or Toolbox licenses®, materials that have been used and/or are not in "saleable condition," and individual components of kits or sets including but not limited to BRIGANCE® Kits, Ready® student and teacher sets, Ready Classroom® student and teacher sets, and Magnetic Reading classroom kits.

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