



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2020-2021 SCHOOL YEAR (REMOTE VERSION)**

FOR

MONSEÑOR OSCAR ROMERO MIDDLE - 8196

Name and Location Code of Charter School

LAUSD Vision

L.A. Unified will be a progressive global leader in education, providing a dynamic and inspiring learning experience where all students graduate ready for success.

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

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

** In light of the COVID-19 outbreak, this oversight report was developed and finalized as part of a remote oversight process. The remote oversight process included the following: review of the Office of Data and Accountability (ODA) data set, review of previous years' oversight reports, review of any tiered intervention notices, discussions with school leaders, and review of documentation placed in an electronic document system.



Charter School Name:		Monseñor Oscar Romero			Location Code:	8196
Current Address:		City:	ZIP Code:	Phone:	Fax:	
2670 W. 11 th Street		Los Angeles	90006	213-413-9600		
Current Term of Charter:			LAUSD Board District:	LAUSD Local District:		
July 1, 2017 to June 30, 2022			2	Central		
Number of Students Currently Enrolled:	Enrollment Capacity Per Charter:	Number Above/Below Enrollment Capacity (day of visit):		Below by 52		
323	375					
Grades Currently Served	Grades To Be Served Per Charter:	Percent Above/Below Enrollment Capacity (day of visit):		Below by -13.87%		
6-8	6-8					
Norm Enrollment Number:			318			
Total Number of Staff Members:	39	Certificated:	17	Classified:	22	
Charter School's Leadership Team Members:		Yvette King-Berg, ED; Rene Quon, Executive Administrator; Kevin Myers, Executive Administrator; Edwin Cruz, Student Services Coordinator; Karina Gamez, Coordinator of Operations; Cynthia Jimenez, Parent Coordinator; Freddy Zepeda, Coordinator of Instruction				
Charter School's Contact for Special Education:		Vashon Nutt, Director of Special Education				
CSD Assigned Administrator:	Dr. Blanca Alves-Monaster		CSD Fiscal Services Manager:	Joseph Daee		
Other School/CSD Team Members:	None					
REMOTE Oversight Visit Date(s):	May 6, 2021		Fiscal Review Date (if different):	N/A		
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	Yes, via Long-Term Lease		LAUSD Co-Location Campus(es) (if applicable):	Berendo Middle School		
			Date of Co-Location meeting with Operations Team:	N/A		

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



CHARTER RENEWAL CRITERIA

In accordance with Education Code §§ 47605, 47607, and 47607.2, in order to renew a charter, the District must determine whether the charter school has met the statutory requirements.

REPORT GUIDE

LAUSD's oversight procedures are intended to balance a charter school's autonomy of operation with its accountability to the public. LAUSD utilizes a holistic, performance-based approach to evaluate all charter schools, guided principally by making decisions in the best interest of students. The CSD observes and monitors each charter school in accordance with applicable laws, regulations, LAUSD policy, memoranda of understanding, and the school's operative charter. Information gathered through oversight serves as part of the charter school's ongoing record for the District to make informed decisions about charter school authorization, renewal, material revisions, sharing of promising practices, and if need be, revocation. While LAUSD is responsible to provide oversight of its charter schools and the entities managing charter schools, the primary oversight of each charter school must first and foremost be performed by the charter school's own governing board. The governing board of a charter school has an ongoing responsibility to oversee the operations of its charter school(s), ensuring that every charter school it oversees is providing a high-quality educational program for students enrolled, is successfully fulfilling the terms of their charter, is fiscally sound, and complies with applicable laws, regulations, and court orders. In designing this document, the District has considered California charter school law, as well as the *LAUSD Policy and Procedures for Charter Schools*, California State Board of Education's criteria for evaluating charter schools, and the National Association of Charter School Authorizers' *Principles and Standards of Quality Authorizing*. This reporting tool provides guidelines and criteria used by the CSD to observe, record, assess, and reflect with the charter school on school performance as captured during the annual oversight visit process in these four categories:

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

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

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

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

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2020-2021*. The "Sources of Evidence" sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

The tool employs the following four-point rubric to rate the school's performance in each category: (4) *Accomplished*, (3) *Proficient*, (2) *Developing*, and (1) *Unsatisfactory*. In addition, the *Summary of School Performance* section in each category captures key findings under one or more of the following headings: (1) Areas of Demonstrated Strength and/or Progress (Note: potential "promising practices" are identified within this section with an asterisk [*]); (2) Areas Noted for Further Growth and/or Improvement; and, if applicable, (3) Corrective Action Required. Under "Corrective Action Required," the CSD reports findings of material noncompliance with applicable law, LAUSD charter policy, or the school's approved charter. **If the report includes any findings under "Corrective Action Required," the charter school must take immediate and appropriate steps to remedy the identified concern.** In accordance with its "tiered intervention" approach to charter school non-



compliance and poor performance, the CSD may also send the school appropriate notices, separate and apart from this report, to provide and document time-specific follow-up as necessary. At the other end of the spectrum of performance, any school that earns a rating of *Accomplished* in any category is encouraged to submit to the CSD a summary of those “promising practices” that the school believes have contributed to its success, in order to support the CSD’s ongoing efforts to promote and facilitate reciprocal sharing of promising practices among education leaders from across the entire portfolio of LAUSD schools.

GOVERNANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>G1: The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s). Evidence collected was from two sources: the website and binder 1.</p> <ul style="list-style-type: none"> • Organizational chart. • Bylaws signed September 10, 2018. • Current roster and contact information with six board members (also included on the website) • Committee Council Meetings, which included topics such as: <ul style="list-style-type: none"> ○ February 23, 2021 – topics included: LCAP Enrollment Update, COVID Prevention Plan, LCAP: Assessments Results: Math and ELA/Reading, Title I, II and III. ○ September 28, 2020 – topics included: Learning Continuity and Attendance Plan, Enrollment Update, and Facilities Update. • Agenda dated March 30, 2020 included topic during closed session: Government Code 554957 Public Employee Performance Evaluation – Evaluation of Executive Director. In addition, an evaluation for the Director of Operations, Coordinator of Instruction, Classified Staff was included as part of Binder 1. <p>G2: The Governing Board complies with most material provisions of the Brown Act, as evidenced by binder documentation and website:</p> <ul style="list-style-type: none"> • A PowerPoint titled “Youth Policy Institute Charter Schools: Brown Act Training” was included for evidence with a letter from a law firm stating that training was completed April 18, 2021. • Agendas and minutes are posted and included as a link on Board-On Track. • Board takes and reports votes in open meeting by creating a motion to approve and calling Roll Call of Board members that are present at the meeting. • The YPICS Board meets on a regular basis (6/27, 8/14, 8/31, 9/28, 10/26, 12/7/2020 and 3/1, 3/8/2021). • Board posts all agendas on the school’s website (board minutes are encouraged). • Per AB 2257, a current board agenda is posted on the homepage of the charter school’s primary website, and accessible through a prominent, direct link by clicking on the section titled “Board Agenda” on the top ribbon of the page. <p>G5: The Governing Board regularly monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria), as evidenced by:</p> <ul style="list-style-type: none"> • Agendas, minutes and documentation labeled BCCS Executive Administrator Report, topics included: 	



- April 2021: enrollment attendance, ELPAC testing, Bolstering Academic Support, update on iReady Diagnostic, typical growth vs. stretch growth.
- January 2021: enrollment attendance, recruitment 2021-2022, iReady results, intervention, and support.
- March 2021: attendance, recruitment update, LA County food distribution, ongoing social emotional support, addressing attendance and truancy.

Areas Noted for Further Growth and/or Improvement

None

Corrective Action Required

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

Notes:

On October 21, 2019 the Youth Policy Institute Charter Schools (YPICS) noted a change in governance structure with a recommendation to approve updating board By-laws and Articles of Incorporation to remove YPI as the sole-statutory member of the YPI Charter Schools, Inc. CSD requests the organization forwards such changes of the documents and approved agendas and minutes once all has been completed to finalize requested Material Revision.

****NOTE: If the CSD gathers or otherwise receives substantial evidence of conflict(s) of interest with respect to a governing board member or person in a school leadership position (e.g. CEO or principal), a charter school shall receive a rating of 1 in this category.***



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

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

- Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations
- Evaluation of school’s executive level leadership (those positions reporting to the Governing Board, as indicated in Element 4, such as Executive Director, Area Superintendent, Principal, etc.)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school leader(s) <input checked="" type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter, nor any mandated committees/councils or a system for the evaluation of the school leader(s)	<input checked="" type="checkbox"/> Organizational chart (B1.1) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas, and minutes (B1.4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1.7) <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)



G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

The Governing Board has a system in place to ensure it is adhering to applicable open meeting requirements, which protect the public interest in transparency and help to ensure that decisions are made without apparent or actual conflicts of interest:

- Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act
- Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition
- Governing Board meeting agendas and minutes are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity
- Governing Board meetings are held in accordance with the requirements of SB 126

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with most material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with some material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with few material provisions of the Brown Act	<input checked="" type="checkbox"/> Board meeting agendas (B1.4) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Brown Act training documentation (B1.8a) <input checked="" type="checkbox"/> Evidence of SB 126 implementation (B1.8b) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1.9) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



G3: DUE PROCESS - GOVERNANCE QUALITY INDICATOR #3

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

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

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



G4: STAFFING - GOVERNANCE QUALITY INDICATOR #4

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

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

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established and monitors policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established some policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established few or no policies and procedures to ensure staffing in compliance with applicable law staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements (B1.13) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2020-2021</i> <input type="checkbox"/> Other: (Specify)



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

<i>The Governing Board has a system in place to ensure ongoing:</i>				
Rubric				
Sources of Evidence				
<ul style="list-style-type: none"> Review and use of academic and other internal school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence Monitoring of the school’s implementation of its LCAP/Learning Continuity Attendance Plan (action plans and progress toward LCAP goals) 				
Performance	<table border="1"> <tr> <td style="background-color: #d9d9e3; vertical-align: middle; text-align: center;">Performance</td> <td> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input type="checkbox"/> The Governing Board monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) </td> <td> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table>	Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input type="checkbox"/> The Governing Board monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input type="checkbox"/> The Governing Board monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify) 		



G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6

The Governing Board has a system in place to ensure fiscal viability:

- The school is fiscally strong and net assets are positive in the prior two independent audit reports.

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input type="checkbox"/> The school is fiscally weak (e.g., inadequate cash flow, financial condition reflecting a downward trend that illustrates significantly deteriorating financial health potentially leading to negative net assets in the current Fiscal Year and/or the following Fiscal Year, etc.), net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division <input type="checkbox"/> The school is consistently fiscally weak (e.g., inadequate cash flow, financial condition reflecting a downward trend that illustrates significantly deteriorating financial health potentially leading to negative net assets in the current Fiscal Year and/or the following Fiscal Year, etc.) and/or net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division	<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other financial information submitted by the school <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)



G7: In light of COVID-19, the school may be unable to provide certain or all documentation to support transactions that were selected for testing for this indicator. If sufficient fiscal documentation is not available, a score will not be earned for this indicator and it will not impact the overall score for the Governance section.

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

<p><i>The Governing Board has a system in place to ensure sound fiscal management and accountability:</i></p> <ul style="list-style-type: none"> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement. 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement <input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement <input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, or has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, and has recurring areas noted for improvement, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.)	<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)
<p>Progress on LAUSD Board of Education and/or MOU Benchmarks related to GOVERNANCE (if applicable):</p>		
<p>N/A</p>		



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	2
California Department of Education’s (CDE) Charter School’s Performance Category	Middle Performing
<p>Does the charter school qualify for technical assistance? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>If yes, what is the school’s identification? (See additional information within “Notes” section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input checked="" type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>A5: The schoolwide Dashboard Chronic Absenteeism Indicator color is green. Monseñor Oscar Romero’s 2019 Chronic Absenteeism Percentage was 6.0%, which was lower than the State at 10.1%.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>A1: The schoolwide Dashboard ELA Indicator color is red. Monseñor Oscar Romero’s 2019 Average DFS was -73.7%, which is lower than the State 2019 Average DFS at -2.5%.</p> <p>A2: The schoolwide Dashboard Math Indicator color is red. Monseñor Oscar Romero’s 2019 Average DFS was -119.8%, which is lower than the State’s 2019 Average DFS at -33.5%.</p> <p>A8: All numerically significant subgroups have “Status/Distance From Standard (DFS)” scores are below the statewide averages in ELA, as follows: English Learners at -100.7 vs. -45.1 points; Latino at -73.9 vs. -26.6 points; Socioeconomically Disadvantaged at -74.1 vs. -30.1 points; and Students with Disabilities at -133.0 vs. -88.1 points.</p> <p>A9: All numerically significant subgroups have “Status/Distance From Standard (DFS)” scores above the statewide averages in Math, as follows: English Learners at -147.7 vs. -68.6 points; Latino at -120.3 vs. -62.2 points; Socioeconomically Disadvantaged at -120.3 vs. -63.7 points; and Students with Disabilities at -197.1 vs. -119.4 points.</p> <p>A1/A2/A8/A9: The school leadership from Monseñor Oscar Romero’s has noted the following steps to address the low academic performance in ELA and Math for all students and numerically significant subgroups:</p> <ul style="list-style-type: none"> • Adoption of a comprehensive curriculum for ELA and adoption of iReady Reading Diagnostic. • Implementation of additional intervention support in ELA – (EL snapshots and EL Academic Aides and SFA leveled classes). • Established weekly individual instructional coaching for all teachers. 	



- Continued to focus on standards-based grading, project-based learning and using technology to enhance engagement and learning.

A6: The schoolwide Dashboard Suspension Rate Indicator color is yellow. Monseñor Oscar Romero's percentage of students suspended at least once was 12.0%, which was higher than the State's at 3.4%. The school's leadership has noted the following:

- Hiring a New Executive Administrator and Coordinator of Culture and Climate.
- Hiring of Coordinator of Student Services and School Culture and Climate Manager.
- Student behavior management trainings with Restorative Practices as well as full PD days dedicated to training staff on providing student with socio-emotional supports.
- Positive Behavior Support Systems Team meets and monitors the highest need students in terms of behavioral intervention and socioemotional support.
- Student Success and Progress teams of staff and family members to assist students in improving poor academic, behavioral and attendance metrics.

A11: The school reclassifies English Learners at 4.4%, which is at a rate lower than the state average at 13.8%. The school's leadership has noted in response to the high At-Risk rate:

- Academic Aides providing support to students during class and after school.
- Success for All classes to give us the opportunity to focus on closing gaps that students have in reading and writing.
- Unpacking standards and creating bite-sized learning outcomes.

Corrective Action Required

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

Notes:

A3: The schoolwide percentage of English Learner Progress making progress towards English proficiency was 52.8%, which was higher than the state at 48.3%. The school 2019 Performance Level was Medium.

A11: YPICS's reclassification criteria are as follows:

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

****EL Masterplan needs to be updated to include *i-Ready*.**

****NOTE: A charter school cannot receive a rating in this category greater than a 1 if the school has been identified as a "low-performing" charter school based on the state's published annual list.***



A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #1

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

- California School Dashboard Schoolwide ELA data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is blue <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is green <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is yellow <input checked="" type="checkbox"/> The schoolwide Dashboard ELA Indicator color is either red or orange <input type="checkbox"/> N/A - No color assigned for the ELA Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #2

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

- California School Dashboard Schoolwide Math data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator color is blue <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is green <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is yellow <input checked="" type="checkbox"/> The schoolwide Dashboard Math Indicator color is either red or orange <input type="checkbox"/> N/A - No color assigned for the Math Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #3

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELPI data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELPI color is blue <input type="checkbox"/> The schoolwide Dashboard ELPI color is green <input type="checkbox"/> The schoolwide Dashboard ELPI color is yellow <input type="checkbox"/> The schoolwide Dashboard ELPI color is either red or orange <input checked="" type="checkbox"/> N/A - No color assigned for the ELPI on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input type="checkbox"/> Other: (Specify)

A4: DASHBOARD SCHOOLWIDE COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #4

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide CCI data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard CCI color is blue <input type="checkbox"/> The schoolwide Dashboard CCI color is green <input type="checkbox"/> The schoolwide Dashboard CCI color is yellow <input type="checkbox"/> The schoolwide Dashboard CCI color is either red or orange <input type="checkbox"/> N/A - No color assigned for the CCI on the Dashboard <input checked="" type="checkbox"/> N/A - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #5

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Chronic Absenteeism Indicator data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is blue <input checked="" type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is green <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is yellow <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is either red or orange <input type="checkbox"/> N/A - No color assigned for the Chronic Absenteeism Indicator on the Dashboard <input type="checkbox"/> N/A - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #6

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Suspension Rate Indicator data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is blue <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is green <input checked="" type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is yellow <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is either red or orange <input type="checkbox"/> N/A - No color assigned for the Suspension Rate Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR - (GRADES 9-12) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #7

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Graduation Rate Indicator data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is blue <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is green <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is yellow <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is either red or orange <input type="checkbox"/> N/A - No color assigned for the Graduation Rate Indicator on the Dashboard <input checked="" type="checkbox"/> N/A - Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school 	<ul style="list-style-type: none"> <input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Provide Graduation Requirements (Additional info within "Notes" section above) (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD SUBGROUP ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #8

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All numerically significant subgroups have "Status/Distance From Standard (DFS)" scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have "Status/DFS" scores above the statewide averages <input checked="" type="checkbox"/> None of the school's numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> N/A - No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A9: DASHBOARD SUBGROUP MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #9

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have “Status/DFS” scores above the statewide averages <input checked="" type="checkbox"/> None of the school’s numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> N/A - No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A10: DASHBOARD SUBGROUP COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #10

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard CCI (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> All numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> None of the school’s numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> N/A - No assessment of performance for this indicator <input checked="" type="checkbox"/> N/A - CCI is not applicable for the grade levels assigned at the charter school 	<ul style="list-style-type: none"> <input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A11: ENGLISH LEARNER RECLASSIFICATION - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #11

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

- English Learner reclassification rate for 2019-2020 (CDE)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the state average <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the state average <input checked="" type="checkbox"/> The school reclassifies English Learners at a rate lower than the state average <input type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> N/A - The school did not have any English Learners <input type="checkbox"/> N/A - No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (Additional info within "Notes" section above) (B2.4) <input type="checkbox"/> Rate of "At Risk" ELs in comparison to the state average <input type="checkbox"/> Higher <input type="checkbox"/> Same <input checked="" type="checkbox"/> Lower (Additional info within "Notes" section above) (B2.4) <input type="checkbox"/> Rate of "LTEs" in comparison to the state average <input checked="" type="checkbox"/> Higher <input type="checkbox"/> Same <input type="checkbox"/> Lower (Additional info within "Notes" section above) (B2.4)



***INDICATOR A12 IS APPLICABLE TO NEW CHARTER SCHOOLS WHICH DO NOT HAVE CAASPP (SBAC)/DASHBOARD SCORES AND ALL CHARTER SCHOOLS**

Due to COVID-19, the school may be unable to provide accurate data for this indicator. If no data is available, a score will not be earned for this indicator and it will not impact the overall score for the Student Achievement and Educational Performance section.

A12: VERIFIED DATA/INTERNAL ASSESSMENTS (ALL Grades and New Charter Schools) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #12**

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

- The school’s “Verified Data”/Internal Assessments (with analysis of results based on the four bullets below) schoolwide, by subgroups, and grade-levels in ELA and Math
- Other academic achievement data gathered or produced by the school, such as Advanced Placement examination participation and passage rates, A-G requirements progress and “strong postsecondary outcome” data (completion rates, high school graduation rates, and college acceptance rates) equal to similar peers

AB1505 “Verified Data” questions:

1. Explain how the data submitted is data derived from nationally recognized, valid, peer-reviewed, and reliable sources that are externally produced.
2. Describe how the data submitted shows “one year’s progress” as growth in achievement in ELA and Math from one academic year to the next.
3. Explain how the data submitted shows that the charter school demonstrates either the same or higher growth levels as schools serving similar student populations, for each year of the charter school's current term of the charter.
4. Explain how the data submitted demonstrates strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates, equal to similar peers, at the time of the submission of the renewal petition.

****NOTE: Indicator A12 Verified Data/Internal Assessments: At this time, a school’s submission of verified data will serve for informational purposes (i.e., instructional areas of focus). Considering the recent adoption of verified data sources by the State Board of Education, as well as potential regulations related to verified data, a school’s submission of during this 2020-2021 oversight visit will not receive a score in the *Student Achievement and Educational Performance* rating. For schools scheduled for renewal in the 2021-2022 fiscal year, the District will consider applicable verified data the school elects to submit as part the school’s scheduled renewal submission, and aligned to State guidance. If a charter school up for a renewal in 2021-2022 chooses to submit verified data/internal assessments as part of their virtual oversight visit, the information provided will not constitute what may be requested as part of the *Renewal Application* submission. Applicable updates by the State will inform further updates related to verified data.**

Rubric		Sources of Evidence
Perfor man	<input type="checkbox"/> The school has demonstrated accomplished levels of student achievement and progress as measured by “Verified Data”/Internal Assessments that are regularly monitored and	<input type="checkbox"/> “Verified Data”/Internal Assessment Data and other relevant information (B2.6) <input type="checkbox"/> Other: (Specify)



	<p>analyzed and that reflect “at least one year’s progress” in student achievement in ELA and Math for all of the school’s numerically significant subgroups in all grade-levels</p> <p><input type="checkbox"/> The school has demonstrated proficient levels of student achievement and progress as measured by “Verified Data”/Internal Assessments that are regularly monitored and analyzed and that reflect “at least one year’s growth” in student achievement in ELA and Math for the majority of the school’s numerically significant subgroups and grade-levels.</p> <p><input type="checkbox"/> The school has demonstrated developing levels of student achievement and progress as measured by “Verified Data”/Internal assessments that are regularly monitored and analyzed and that reflect “at least one year’s growth” in student achievement in ELA and Math for less than a majority of the school’s numerically significant subgroups and grade-levels</p> <p><input type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by “Verified Data”/Internal assessments and that reflect no growth or a decline in student achievement in ELA and Math for the majority of the school’s numerically significant subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data; or <u>did not</u> provide “verified data”.</p> <p><input checked="" type="checkbox"/> N/A - No assessment of performance for this indicator.</p>	
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Progress on LAUSD Board of Education and/or MOU Benchmarks related to STUDENT ACHIEVEMENT (if applicable):
N/A



LEARNING CONTINUITY AND ATTENDANCE PLAN 2020-2021 (For Informational Purposes Only)

The CSD reviewed the Learning Continuity and Attendance Plan.

All requested template information and descriptions were provided:	Sources of Evidence
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> General Information <input checked="" type="checkbox"/> Stakeholder Engagement <input checked="" type="checkbox"/> In-Person Instructional Offerings <ul style="list-style-type: none"> Actions Related to In-Person Instructional Offerings <input checked="" type="checkbox"/> Distance Learning Program which includes: <ul style="list-style-type: none"> Continuity of Instruction, Access to Devices and Connectivity, Pupil Participation and Progress, Distance Learning Professional Development, Staff Roles and Responsibilities, Supports for Pupils with Unique Needs, Actions Related to the Distance Learning Program <input checked="" type="checkbox"/> Pupil Learning Loss <ul style="list-style-type: none"> Pupil Learning Loss Strategies, Effectiveness of Implemented Pupil Learning Loss Strategies, Actions to Address Pupil Learning Loss <input checked="" type="checkbox"/> Mental Health and Social Emotional Well-Being <input checked="" type="checkbox"/> Pupil and Family Engagement and Outreach <input checked="" type="checkbox"/> Additional Actions to Implement the Learning Continuity Plan <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners and Low-Income Students 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Learning Continuity Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)

Notes:

None



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O1: The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety, as evidenced by Binder 3 and other documentation:</p> <ul style="list-style-type: none"> • The school provided their COVID/Safety-re-opening plan checklist which includes tasks such as safety signage, mark spots for line, line signs, temperature taking, symptom check questions, and arrows for traffic. • A MORCS Executive Administrator Board Report which provides details regarding re-opening and website to communicate any pans, schedule, uniforms, student supplies, weekly COVID testing details, etc. • MORCS Re-Opening Implementation Plan, with day-by-day details such as Virtual Orientation for 6th grade, Staff/Student COVID testing, and needs assessment. • Student Return to Campus Contract with delineated expectations to support healthy habits and lessened safety risks. • Evacuation and Lockdown Drill training PD dated May 10, 2021. • Scheduled two drills after return to campus: Evacuation Drill and Lockdown Drill/Evacuation Formation Maps. <p>O2: The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens, as evidenced by:</p> <ul style="list-style-type: none"> • Essential Safety Checklist and Certificate of Occupancy from the Office of Environmental Health and Safety. • TDAP certification dated September 24, 2020 with 116 students enrolled as of September 24, 2020 with 5 students missing Tdap. The school provided process for communication to families regarding vaccination TDAP compliance and step by step follow up with families to ensure all students have completed TDAP prior to attending school. • Evidence via pictures that the school maintains current epinephrine auto injector. Documentation of training in the form of email verifying the training date (April 26, 2021) and a handout for such training. • Certification via letter as evidence that the school provides adequate free or reduced priced meal each day per AB1871 (signed by Board Chair). <p>O6: The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, as evidenced by:</p> <ul style="list-style-type: none"> • District Validation Review which was completed in 2018-2019. • Professional Development, some of the topics: 4 Best Practices for Distance Learning to Support Students Who Learn and Think Differently; Co-Teaching Virtually; and Using Intervention models to support students with high needs. • The school leadership provided the following updates to Welligent reports: <ul style="list-style-type: none"> ○ 300 report: 7 in tier 4; 4 in tier 5; and 4 in tier 6 - provided status and next action steps to ensure all services are below Tier 4. • 200 report: 3 overdue IEP's, provided update and assurance that IEP's are scheduled/in progress. 	



- O9: The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns, as evidenced by:
- Evidence – binder 3.3J; included a letter to parents to keep them informed of weekly goals to provide support in and out of the classroom. Goals included academic areas such as math, reading, writing, listening and speaking.
 - Agenda from SSC February 3, 2021 included topics such as consolidated application, LCAP review of financials, iReady testing results (LCAP Update), enrollment, etc.
- O11: The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements as evidenced by documentation and leadership report:
- The school leadership reported:
 - The Leadership in Instruction Team provides individual weekly coaching meetings focusing on data, observation/feedback and Instructional Rounds. The LIT team is still learning data collection to be able to capture current data of actual observations, coaching and sessions.
 - LIT team conducts weekly classroom walkthroughs as evidenced by the LIT team schedule provided and weekly meeting notes.
 - They are using wet stone to collect data, (through Relay training), we have implemented higher level of teacher support and coaching. Weekly lesson plans, coaching (data, observation and feedback, data rounds) and discussion during weekly PD.
 - Evidence of a Team Meeting PD dated April 12, 2021 where teachers have an opportunity to reflect on their use of strategies in utilizing exemplars and reflecting upon refining strategies. Teachers had an opportunity to share, provide context and reflect upon their “glows, grows and next steps.”
 - The school leader shared as evidence a two coaching videos- topic: data with the purpose on data reflection and providing next steps to the data analysis.
 - Evidence of Quick Meeting – Coaching meetings with shared notes, glows, grows, and questions.

Areas Noted for Further Growth and/or Improvement

- O3: The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS, as evidenced by:
- 3.3a Standards Based Instructional Programs summary with links to curriculum mapping.
 - The school leadership noted instructional planning includes several stages: stage 1: Scope and Sequence; Stage 2: Rubric Writing; Stage 3: Unit Plan Creation; Stage 4: Critical Friends discussion and tuning protocol ; and Stage 5: Hallmarks and strategy alignment.
 - Evidence of YPICS Curricular Maps with CASA/Service-Learning Focus curriculum by unit with suggested timeframe, common core or California State Standards, Main Outcomes, Essential Questions and Service Learning/CASA connections at different stages of development as some of the Maps were not fully developed for the 2020-2021 school year, while others such as 6th grade Science were dated for the 2016-2017 school year; 7th grade Science dated 2017-2018 school year; 8th grade Science dated 2018-2019 school year.
 - Per leadership, all teachers shared unit writing by looking at the YPICS curriculum maps.
 - The school is on their second year of implementation of iReady, which includes differentiated instruction, online instruction, assessments, and teacher resources.
- O4: The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis, as evidenced by:



- The school leadership noted using Academic Aides to support English Learners by creating learning profiles with domain specific objectives.
- Designated teaching blocks for Math Support and SFA classes taught by ELA and History teachers who work on lessons that target the 4 core domains of reading writing, speaking and listening.
- Currently 40% of Els have met their growth goals per Reading diagnostic while 45% have met their growth goals in Math diagnostic.
- The school provided snapshots with i-Ready data which provides student annual typical growth, annual stretch growth and placement on the scale score. Diagnostic growth data provided for the end of year review is dated August 12, 2020.
- Per leadership, 40% of Els have met their growth goals in the Reading diagnostic, while 45% have met their growth goals in the Math diagnostic.
- Based on the iReady data provided in Math, 297/323 students assessed: 17% of students at the beginning of 2020-2021 are at or above grade level, with a breakdown per grade level as follows:
 - 22% in 6th grade; 16% in 7th grade; 16% in 8th grade.In Reading, 279/323 students assessed: 25% of students are at or above grade level with a breakdown per grade level as follows:
 - 22% in 6th grade; 24% in 7th grade; and 26% in 8th grade.
- A sample of an Individualized English Learner Support Plan snapshot that includes goals and supports (this one dated 2018-2019), with classroom supports and accommodations, domain specific objectives, the student's academic profile (ELAPC, domains, reclassification status, NWEA/MAP Data, grades data), and follow up.
- A schedule noting "pull-outs" (2019-2020 fall tutor schedules).

O5: The school has partially implemented the key features of the educational program described in the charter as evidenced by:

- A PowerPoint titled: Standards-Based Grading for Mastery-Planning and Practice Overview.
- Professional development topics included: Get Better Faster. A handout of the SFA Program Description.
- In addition, evidence of the SFA program was included in the form of data from the iReady Diagnostic and schedules.

O7: The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights, as evidenced:

- Leadership provided a MORCS restorative justice needs assessment implementation recommendations, which included the following insightful information (taken in 2019-2021):
 - 90% of the faculty members have participated in 2 or fewer restorative professional developments.
 - 60% of the faculty members said they were interested in increasing their use of restorative practices.High level implementation recommendations included:
 - Formalize and document restorative practices from referral to follow up; incorporate the use of written accountability agreements; improve transparency in process and outcomes of Tier 3; include harmed individual in decisions; increase the use of restorative circles; increase the use of re-entry circles in cases where student was separated from the school.
 - Establish norm around non-violence and peacemaking; kindness curriculum into classrooms; deepen cooperation and positive interdependence by creating shared responsibility for achieving the school's goals on and off campus.
 - Train all staff on the 11 essential skills and knowledges and increase the use of proactive restorative practices in the classroom.



- Evidence of PD on Restorative Practices for Educators dated March 22-23, 2021.
- Anti-bullying program virtual training email dated February 24, 2021.
- MTSS Intake form sample with student name; grade; summary of needs, academic, behavioral socioemotional and attendance needs rating; average; other comments; EL; SPED; date; notes; next steps; and staff lead.
- The 2019 suspension rate for MORCS is 12% and the dashboard color is yellow.

O9: Parent complaint online is UCP only on the parent section, ensure parent section also includes process for General Complaints.

Corrective Action Required

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

Notes:

None

****NOTE: A charter school shall receive a rating of 1 in this category for any of the following reasons: (1) Failed to have Health, Safety, and Emergency Plan in place; (2) Failed to conduct child abuse mandated reporter training in accordance with AB 1432; (3) Failed to complete criminal background clearances for all new staff and sole proprietor (as defined on the Certification of Clearances, Credentialing, and Mandated Reporter Training 2020-2021) prior to employment; or (4) Failed to obtain DOJ clearance certification, as appropriate, from a vendor. A charter school cannot receive a rating in this category greater than 2 if any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.***



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

<p><i>The school has a system in place to ensure that:</i></p> <ul style="list-style-type: none">• The school has a current site-specific comprehensive Health, Safety, and Emergency Plan (Note: for co-locations, the charter school adheres and complies with the District school’s Health, Safety and Emergency Plan)• The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)• School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting in accordance with the requirements of AB 1432• School staff receives annual training on the handling of bloodborne pathogens• The school has a Visitor’s policy and it’s visible in the main office• AB 1767, requires the governing board or body of a local education agency (LEA) that serves pupils in kindergarten and grades 1 to 6, inclusive, to adopt, and update as prescribed, a policy on pupil suicide prevention that specifically addresses the needs of high-risk groups• A Pupil Suicide Prevention Policy (grades 7-12) is in place, in compliance with AB 2246	
Rubric	Sources of Evidence



Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input checked="" type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Evidence of AB 1767 implementation (grades K-6) (B3.1g) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2020-2021</i> (“ESSA Grid”) (B3A.1) <input checked="" type="checkbox"/> Virtual classroom observation <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2

The school has a system in place to ensure that:

- For each school site, the school has a current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- School provides documentation of student immunization and
- School provides documentation of health screening per applicable law and terms of the charter (vision screenings upon school entry and every third year thereafter through grade 8 and hearing screenings are mandated in kindergarten/first grade and in second, fifth, eighth, tenth/eleventh grade and upon first school entry)
- School maintains an emergency epinephrine auto-injectors (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen, per applicable law
- Per AB 1871, charter schools are required to provide needy students with one nutritionally adequate free or reduced priced meal each day
- Per AB 2009, any charter school that offers an interscholastic athletic program is required to have at least one automated external defibrillator (AED)
- Per SB 972, student ID cards for schools serving grades 7-12 have the phone number of the National Suicide Prevention Lifeline printed on at least one side

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input checked="" type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a) <input checked="" type="checkbox"/> Evidence of student immunization (B3.2b) <input checked="" type="checkbox"/> Evidence of health screening (B3.2b) <input checked="" type="checkbox"/> Evidence of Epi-pen (B3.2c) <input type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <input type="checkbox"/> Evidence of SB 972 (B3.2f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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



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

<i>The school:</i>							
<ul style="list-style-type: none"> • Implements the differentiation, intervention, and other instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all subgroups identified in the school’s LCAP and by CDE • Disaggregates and analyzes data on a regular basis to address individual student needs • Implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification) • Has appointed a designee to assist and support foster youth 							
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #f2d2d2; width: 30%; text-align: center;">Rubric</th> <th style="background-color: #f2d2d2; text-align: center;">Sources of Evidence</th> </tr> </thead> <tbody> <tr> <td style="background-color: #f2d2d2; vertical-align: middle; text-align: center; font-weight: bold;">Performance</td> <td> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; vertical-align: top;"> <ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and does not consistently modify instruction based on data analysis </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP/Learning Continuity and Attendance Plan (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students (B3.3j) <input checked="" type="checkbox"/> Implementation of the school’s English Learner Master Plan (B3.3j) <input type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <input checked="" type="checkbox"/> Virtual Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table></td></tr></tbody> </table>	Rubric	Sources of Evidence	Performance	<table border="1" style="width: 100%; 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O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #5

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

O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6

<i>The school has a system in place to ensure that the school:</i>		
	Rubric	Sources of Evidence
	<ul style="list-style-type: none"> • Provides special education programs and services in accordance with students' IEPs • Provides special education training for staff • Conducts a special education self-review annually, using the Special Education Self-Review Checklist • Maintains timely IEP timeline records and accurate service provision records in Welligent 	
Performance	<input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input checked="" type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j) <input checked="" type="checkbox"/> Self-Review Checklist (B3.4a) <input checked="" type="checkbox"/> Other special education documentation (B3.4a) <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.4a) <input checked="" type="checkbox"/> Virtual classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input checked="" type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3.4c) <input checked="" type="checkbox"/> Evidence of data monitoring (B3.4c) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, and disproportionality (B2.1) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates <input checked="" type="checkbox"/> Evidence of implementation of AB 2291 (B3.4c) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p>The school:</p> <ul style="list-style-type: none"> • Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs • Provides faculty and other instructional staff with professional development opportunities to improve instructional practice • Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 	
<p>Rubric Sources of Evidence</p>	
<p>Performance</p>	<ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

Rubric	Sources of Evidence
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Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.4d) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O10: TRANSPARENCY FOR STAKEHOLDERS- ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #10

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

- Information is easily accessible to the public and school stakeholders, and is presented in English and applicable languages as required by law
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year
- Per AB 34, ensure that specified information on bullying and harassment prevention is readily accessible in a prominent location on the LEA's existing website in a manner that is easily accessible to parents or guardians of pupils (Gr. K-6)**

**required on website

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website <input checked="" type="checkbox"/> The school has a well-developed system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website	<input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> • UCP Procedure and Forms • Complaint Forms • SB 1375 Information • AB 2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics • Student Achievement Information <input checked="" type="checkbox"/> Evidence of implementation of AB 2022 (B3.4e) <input checked="" type="checkbox"/> Evidence of implementation of AB 34 (B3.4e) <input type="checkbox"/> Other: (Specify)



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

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

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

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



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

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

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- Individuals employed in a teaching position during the 2019–20 school year are on track to obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code, § 47605.4(a).)
- The school has identified its CalSASS charter user(s) to complete the CTC training, and review related information in order to provide ongoing monitoring and responses to any exceptions (possible misassignments) identified by the CTC.
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform schoolsite services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2020-2021</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/6/2021

N/A



8196	2017-2018					2018-2019					2019-2020				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Monseñor Oscar Romero Charter Middle															
Cash and Cash Equivalents		1,210,062	1,206,380	5,514,805	5,461,380		0	1,601,636	2,788,432	2,788,433		2,463,044	2,403,782	2,889,742	2,889,828
Current Assets		1,662,547	1,643,137	5,883,465	5,882,314		0	2,242,231	3,350,157	3,350,158		3,050,966	3,036,562	3,605,738	3,605,823
Fixed and Other Assets		15,756,756	15,757,006	23,126,870	23,423,020		0	30,279,989	28,913,251	28,913,251		28,318,362	28,316,644	28,243,018	28,243,018
Total Assets		17,419,302	17,400,143	29,010,335	29,305,334		0	32,522,220	32,263,408	32,263,409		31,369,328	31,353,206	31,848,756	31,848,841
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		209,960	190,142	4,078,263	4,106,556		0	605,702	1,136,672	1,159,164		986,426	919,670	1,301,700	1,465,918
Other Long Term Liabilities		7,869,977	7,869,977	7,903,472	7,848,092		0	7,772,940	7,844,033	7,821,628		7,672,652	7,672,652	7,691,150	7,527,017
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		8,079,938	8,060,119	11,981,735	11,954,648		0	8,378,642	8,980,704	8,980,792		8,659,077	8,592,322	8,992,850	8,992,935
Net Assets		9,339,365	9,340,024	17,028,600	17,350,686		24,643,712	24,143,578	23,282,704	23,282,617		22,710,251	22,760,884	22,855,906	22,855,906
Total Revenues	10,242,847	8,786,825	8,886,942	16,323,670	16,645,758	4,483,526	11,904,245	11,384,621	11,223,654	11,223,654	4,538,877	4,715,057	4,797,564	4,702,564	4,702,563
Total Expenditures	4,229,658	4,069,005	4,168,462	3,916,614	3,916,616	4,350,205	4,289,133	4,269,644	5,291,639	5,291,723	5,182,703	5,287,510	5,319,297	5,129,275	5,129,274
Net Income / (Loss)	6,013,189	4,717,820	4,718,480	12,407,056	12,729,142	133,321	7,615,112	7,114,977	5,932,015	5,931,931	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	6,013,189	4,717,820	4,718,480	12,407,056	12,729,142	133,321	7,615,112	7,114,977	5,932,015	5,931,931	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)
Net Assets, Beginning	2,003,881	4,578,245	4,578,245	4,578,245	4,621,544	19,136,923	17,028,600	17,028,601	17,028,600	17,350,686	24,143,577	23,282,704	23,282,704	23,282,704	23,282,617
Adj. for restatement / Prior Yr Adj	0	43,300	43,299	43,299	0	0	0	0	322,089	0	(498,852)	0	(87)	(87)	0
Net Assets, Beginning, Adjusted	2,003,881	4,621,545	4,621,544	4,621,544	4,621,544	19,136,923	17,028,600	17,028,601	17,350,689	17,350,686	23,644,725	23,282,704	23,282,617	23,282,617	23,282,617
Net Assets, End	8,017,070	9,339,365	9,340,024	17,028,600	17,350,686	19,270,244	24,643,712	24,143,578	23,282,704	23,282,617	23,000,899	22,710,251	22,760,884	22,855,906	22,855,906

8196	Audited Financials					2020-2021				
	2016-17	2017-18	2018-19	2019-20	2020-21	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Monseñor Oscar Romero Charter Middle										
Cash and Cash Equivalents	13,267,671	5,461,380	2,788,433	2,889,828	0		1,442,763	1,471,791	0	0
Current Assets	13,624,341	5,882,314	3,350,158	3,605,823	0		3,293,151	3,291,693	0	0
Fixed and Other Assets	6,400,377	23,423,020	28,913,251	28,243,018	0		27,430,967	27,473,415	0	0
Total Assets	20,024,718	29,305,334	32,263,409	31,848,841	0		30,724,118	30,765,108	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	12,232,086	4,106,556	1,159,164	1,465,918	0		925,284	941,197	0	0
Other Long Term Liabilities	3,171,088	7,848,092	7,821,628	7,527,017	0		7,495,024	7,495,023	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	15,403,174	11,954,648	8,980,792	8,992,935	0		8,420,308	8,436,220	0	0
Net Assets	4,621,544	17,350,686	23,282,617	22,855,906	0		22,303,810	22,328,888	0	0
Total Revenues	6,568,692	16,645,758	11,223,654	4,702,563	0	4,299,621	5,155,874	4,981,163	0	0
Total Expenditures	3,844,921	3,916,616	5,291,723	5,129,274	0	5,009,355	5,707,970	5,508,181	0	0
Net Income / (Loss)	2,723,771	12,729,142	5,931,931	(426,711)	0	(709,734)	(552,096)	(527,018)	0	0
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	2,723,771	12,729,142	5,931,931	(426,711)	0	(709,734)	(552,096)	(527,018)	0	0
Net Assets, Beginning	1,897,773	4,621,544	17,350,686	23,282,617	0	22,760,884	22,855,906	22,855,906	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	1,897,773	4,621,544	17,350,686	23,282,617	0	22,760,884	22,855,906	22,855,906	0	0
Net Assets, End	4,621,544	17,350,686	23,282,617	22,855,906	0	22,051,150	22,303,810	22,328,888	0	0



FISCAL OPERATIONS						RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 3, <i>Proficient</i>.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p> <p>Monseñor Oscar Romero Charter Middle’s fiscal condition has been positive since the 2016-2017 Fiscal Year. According to the 2019-2020 independent audit report, the school had positive net assets of \$22,855,906 and a net loss of (\$426,711). The 2020-2021 Second Interim projected positive net assets of \$22,328,888 and a net loss of (\$527,018).</p> <p>According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2020, Monseñor Oscar Romero Charter Middle is one of three schools operated by YPICS, all of which are currently authorized by the Los Angeles Unified School District (LAUSD). YPICS and its charter schools reported positive net assets of \$26,025,224 and a net loss of (\$805,524). YPICS, without its charter schools, reported negative net assets of (\$16,373) and a net loss of (\$16,738). The organization attributed the reported net loss to home office staff’s accrued vacation expenses. According to YPICS, there are no management fees charged to Monseñor Oscar Romero Charter Middle or to the other charter schools that it operates. Instead, each school pays a portion of the actual expenses for shared costs and administrative services, including the salaries of YPICS’ Executive Director, its Chief Operations Officer, and other Learning and Support Center positions that are related to the organization as a whole. These costs are allocated on a pro-rated basis among the YPICS schools based on Average Daily Attendance (ADA).</p> <p>Areas of Demonstrated Strength and/or Progress:</p> <p>1. The school’s fiscal condition is positive.</p>						3
	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Second Interim)	
Net Assets	\$4,621,544	\$17,350,686	\$23,282,617	\$22,855,906	\$22,328,888	
Net Income/ Loss	\$2,723,771 ¹	\$12,729,142 ¹	\$5,931,931 ¹	(\$426,711)²	(\$527,018)³	
Transfers In/ Out	\$0	\$0	\$0	\$0	\$0	
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0	



- ¹The significant increases in the school’s fiscal operational results were primarily due to Proposition 1D funds received in Fiscal Years 2016-2017 and 2017-2018, and LAUSD Augmentation Grant funds received in Fiscal Year 2018-2019.
- ² The operating loss reported for Fiscal Year 2019-2020 was primarily due to \$819,474 in depreciation expenses charges (non-cash in nature) recognized in the school’s Proposition 1D property.
- ³The projected net loss for Fiscal Year 2020-2021 was primarily due to \$814,525 in depreciation expenses, similar to the explanation provided above.

Areas Noted for Further Growth and/or Improvement:

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

1. Checks Outstanding for 90 Days or More (Recurring Issue):

Based on the CSD’s review and analysis of a sample of the school’s Bank Reconciliation Reports for the period from May 2020 through October 2020, the CSD noted 13 checks that, as of October 31, 2020, had been outstanding for 90 days or more. Details regarding these checks are provided below. This is a recurring issue cited in the school’s 2019-2020 Annual Performance-Based Oversight Report.

Item #	Acct. # Ending in	Check #	Check Issuance Date	Payee	Check Amount	Number of Days Check Outstanding (As of 10/31/2020)	Transaction Description	School's Responses
1	X6905	307394	8/20/2019	School Employee	\$1.46	438	16/17 STRS Refund	Will contact State Treasury Department
2	X6905	307672	11/15/2019	School Employee	\$722.60	351	WASC Visit Expense Reimbursement	Voided in March 2021



Annual Performance-Based Oversight Visit Report

3	X6905	307695	11/20/2019	Sylmar Charter High School	\$325.00	346	Registration Fee - Girls Volleyball Tournament	Voided in March 2021
4	X6905	307813	1/10/2020	School Employee	\$23.63	295	18/19 STRS Refund	Will contact State Treasury Department
5	X6905	307814	1/10/2020	School Employee	\$5.29	295	18/19 STRS Refund	Will contact State Treasury Department
6	X6905	307815	1/10/2020	School Employee	\$12.67	295	18/19 STRS Refund	Will contact State Treasury Department
7	X6905	307817	1/10/2020	School Employee	\$5.48	295	18/19 STRS Refund	Will contact State Treasury Department
8	X6905	307823	1/10/2020	School Employee	\$6.10	295	18/19 STRS Refund	Will contact State Treasury Department
9	X6905	307831	1/10/2020	School Employee	\$13.52	295	18/19 STRS Refund	Will contact State Treasury Department
10	X6905	307812	1/10/2020	School Employee	\$21.76	295	18/19 STRS Refund	Will contact State Treasury Department
11	X6905	307903	1/30/2020	School Employee	\$247.50	275	GEAR UP and Relay Conferences Per Diem	Voided in March 2021
12	X6905	308111	4/9/2020	School Employee	\$38.11	205	Paint Set for Students Fun Activities	Will be voided and reissued
13	X6905	308177	5/6/2020	School Employee	\$27.50	178	USPS Reimbursement	Will be voided and reissued
Total					\$1,450.62			



The school stated that it did not want to void the STRS refund checks without making an earnest attempt to locate its former employees. The COVID-19 pandemic made it more challenging to search for them. The school will contact the State Treasury Department to determine the next steps in obtaining assistance to locate the recipients.

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

2. Check Reviews (Late Fees and Finance Charges):

Based on the CSD’s review of the school’s check register for the period spanning from December 2019 through November 2020, a sample of 35 checks were selected for further review. The CSD noted seven checks (supported by invoices) that referenced late fees and finance charges. These items are summarized below.

Item #	Check #	Check Issuance Date	Vendor	Transaction Description	Check Amount	Late Fees	Finance Charges
1	307833	1/10/2020	Xerox Financial Services	Copier Lease	\$2,231.15	\$31.27	N/A
2	307931	1/31/2020	Xerox Financial Services	Copier Lease	\$3,990.72	\$96.78	N/A
3	307953	2/13/2020	Sparkletts	Bottle Water	\$10.00	\$10.00	N/A
4	308077	4/6/2020	AT&T	Fax	\$407.86	\$10.00	NA
5	309354	8/5/2020	AT&T	Fax	\$409.54	\$10.00	N/A
6	309384	8/19/2020	Quadient Finance USA, Inc.	7/20- Late Fee	\$51.47	\$39.00	\$12.47
7	309605	11/12/2020	Quadient Finance USA, Inc.	10/6/20- Late Fee	\$39.89	\$39.00	\$0.89
Total					\$7,140.63	\$236.05	\$13.36

According to the school, the late fees and finance charges referenced above were due to delays in receiving and/or retrieving mail due to COVID-19 related school campus closure and shorter payment term periods than expected. The CSD was advised that school is in the process of changing copier leases to a different provider that would have more favorable billing and payment terms.

The CSD recommends that the school implement procedures to track all invoices and ensure that all vendors are paid timely, to avoid additional finance and late charges in the future.

3. Lack of Documented Pre-Approvals for Employee Reimbursements (Recurring Issue):

Based on the CSD’s review of the supporting documents provided by the school, the CSD noted six employee reimbursements that lacked evidence of pre-approval from either the school’s Executive Director, its Chief Operations Officer, or its Executive Administrator/Assistant Executive Administrator. The reimbursements in question are summarized below.



Item #	Reimbursement Check Issuance Date	Check #	Payee	Reimbursement Check Amount	Transaction Description
1	3/24/2020	308072	School Employee	\$51.60	Stamps and remote for LSC parking lot
2	4/22/2020	308124	School Employee	\$519.89	Student activities supplies
3	4/29/2020	308141	School Employee	\$216.50	Classroom supplies
4	6/24/2020	308272	School Employee	\$469.44	Graduation supplies
5	8/5/2020	309358	School Employee	\$54.70	Document camera for SpEd assessment
6	10/9/2020	309475	School Employee	\$17.95	Staff PD (coffee)
Total				\$1,330.08	

Page 15 of YPICS’ 9/30/2019 Fiscal Policies and Procedures states: “An employee or school volunteer seeking to make a school-related purchase must obtain pre-approval from the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator.”

During the 2019-2020 fiscal review, the school informed the CSD that it intended to revise its fiscal policies and procedures and would propose an acceptable method of employee reimbursement pre-approval to its governing board for consideration (which, according to the school, could include some form of email approval or other documentation). However, as of the date of this report, YPICS’ fiscal policies and procedures have not been revised and updated.

During the CSD 2020-2021 oversight, the school indicated that YPICS is in the process of reviewing and updating its current fiscal policies and procedures to clearly define all protocols, criteria, and acceptable methods of pre-approval of employee expense reimbursements.

The CSD recommends that the school strengthen its fiscal policies and procedures pertaining to documenting pre-approval process of employee expense reimbursements, and ensure adherence to the processes outlined in its governing board-approved fiscal policies and procedures.

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/6/2021

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

None noted.

Corrective Action Required:

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

**Notes:**

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2020 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: None Reported
 - d. Going Concern: None Reported
2. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
3. Governing board meeting minutes reflecting the adoption of the 2020-2021 budget were provided.
4. Evidence of Monseñor Oscar Romero Charter Middle offering STRS, PERS, a 403(b) Tax-Sheltered Annuity Plan, and/or Social Security benefits to its employees and proof of payment was provided.
5. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
6. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
7. Per the 2019-2020 audit report, the school's cash and cash equivalents is \$2,889,828, and total expenditures equal \$5,129,274. Therefore, the school's cash reserve level is 56.34%, which exceeds the recommended 5%.
8. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
9. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
10. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
11. A copy of the charter school's organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee with responsibilities outlined within the charter school's financial policies and procedures was provided.
12. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
13. Reviewed the following 35 checks, and seven deposits, and three transfer credit transactions. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Check numbers (Pacific Western Bank Checking Account Ending in X6905): 307833; 307887; 307901; 307903; 307931; 307953; 308072; 308077; 308124; 308141; 308157; 308174; 308233; 308272; 308282; 308322; 309354; 309357; 309358; 309359; 309384; 309454; 309475; 309477; 309495; 309530; 309542; 309555; 309595; 309605; 309613; 309615; 309619; 309632; and 309647.
 - b. Deposits and transfer credit transactions (Pacific Western Bank Checking Account Ending in X6905): Seven deposits: 1) 5/7/2020 for \$1,527,500; 2) 5/13/2020 for \$1,200; 3) 5/27/2020 for \$21,375; 4) 6/25/2020 for \$42,207.28; and 5) 10/1/2020 for \$9,028.01; 6) 10/15/2020 for \$844.75; and 7) 10/15/2020 for \$4,500.00 and two transfer credit transactions: 1) 8/17/2020 for \$1,100,000 and 2) 8/17/2020 for \$2,000,000.
 - c. Transfer credit transaction (Pacific Western Bank Checking Account Ending in X8366): 5/8/2020 for \$1,527,500.00.
14. Reviewed credit card statements from May 2020 through October 2020. Selected the months of May 2020, June 2020, July 2020, August 2020 and September 2020 for sample testing. No discrepancies were noted.
 - a. California Credit Union Credit Card Ending in X0005 (Chief Operations Officer)
 - b. California Credit Union Credit Card Ending in X0013 (Executive Director)



- c. California Credit Union Credit Card Ending in X0178 (Coordinator of Operations, Monseñor Oscar Romero Charter)
 - d. California Credit Union Credit Card Ending in X0194 (Assistant Executive Administrator, Bert Corona Charter High)
 - e. California Credit Union Credit Card Ending in X0251 (Executive Administrator, Monseñor Oscar Romero Charter)
 - f. California Credit Union Credit Card Ending in X0269 (Coordinator of Operations, Bert Corona Charter High)
 - g. California Credit Union Credit Card Ending in X0152 (Executive Administrator, Bert Corona Charter High)
 - h. California Credit Union Credit Card Ending in X0285 (Director of Technology)
15. Reviewed bank statements and bank reconciliations from May 2020 through October 2020. Selected the months of May 2020 through October 2020 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
- a. Wells Fargo Bank Business Checking Account Ending in X3232 (Operating Account, Bert Corona Charter)
 - b. US Bank Business Checking Account Ending in X0299 (Parent Account, Bert Corona Charter)
 - c. US Bank Business Checking Account Ending in X0552 (Student Body Account, Bert Corona Charter)
 - d. Pacific Western Bank Checking Account Ending in X6905 (Operating Account, Bert Corona Charter)
 - e. Pacific Western Bank Checking Account Ending in X7309 (Operating Account, Monseñor Oscar Romero Charter)
 - f. Pacific Western Bank Checking Account Ending in X7468 (Operating Account, Bert Corona Charter High)
 - g. Pacific Western Bank Checking Account Ending in X3491 (Construction Account, Monseñor Oscar Romero Charter)
 - h. Chase Bank Business Checking Account Ending in X0661 (Parent Account, Monseñor Oscar Romero Charter)
 - i. Chase Bank Business Checking Account Ending in X7817 (Student Body Account, Monseñor Oscar Romero Charter)
 - j. California Credit Union Business Checking Account Ending in X5561 (Operating Account, Bert Corona Charter)
 - k. Pacific Western Bank Checking Account Ending in X8366 (PPP Loan)
16. A Segregation of Duties (SOD) review was conducted remotely at Bert Corona Charter via videoconference. No discrepancies were noted.
17. Reviewed student body financial records from May 2020 through October 2020. No discrepancies were noted.
18. Equipment inventory was provided.
19. The Education Protection Account (EPA) allocation and expenditures pertaining to the prior Fiscal Year (i.e., 2019-2020) are posted on the charter school's website.
20. The most current Audited Financial Statements are posted on the charter school's website.
21. The 2020-2021 Learning Continuity and Attendance Plan and Budget Overview for Parents were submitted to LAUSD.
22. The most current Learning Continuity and Attendance Plan and Budget Overview for Parents are posted on the charter school's website.
23. The school shared that it is engaged in intraorganizational borrowing. Bert Corona Charter High was approved to borrow up to \$600,000 from Monseñor Oscar Romero Charter Middle. The stated purpose of this loan is to assist Bert Corona Charter High with its cash flow needs. The governing board meeting minutes reflecting the approval of this intraorganizational borrowing were provided. Per the school's most recent reconciliation (February 2021), the intraorganizational borrowing balance was \$0. Additionally, per the 2019-2020 audit report, Monseñor Oscar Romero Charter Middle was awarded \$15,643,256 through Proposition 1D of which \$7,821,628 was a grant and \$7,821,628 was a long-term debt with an interest rate of 2% per year. The liability is secured by the property acquired and constructed with these funds. Monthly payments of principal and interest began in January 2020 and are expected to be made through January 2049. As of June 30, 2020 the outstanding balance on this loan was \$7,728,851. A copy of the Funding Agreement between the State of California and Monseñor Oscar Romero Charter Middle and the Memorandum of Understanding by and among Monseñor Oscar Romero Charter Middle, Los Angeles Unified School District, and the State of California was provided to the CSD.
24. Documentation pertaining to the U.S. Small Business Administration's (SBA) Paycheck Protection Program (PPP) was provided.



- 25. Documentation pertaining to grants that the school received during both Fiscal Years 2019-2020 and 2020-2021 due to the COVID-19 pandemic (e.g., grants through the Coronavirus Aid, Relief, and Economic Security (CARES) Act, such as the Elementary and Secondary School Emergency Relief (ESSER) fund, the Governor’s Emergency Education Relief (GEER) Fund, Learning Loss Mitigation Funding, etc.) was provided.
- 26. Pursuant to AB 1871, a signed written statement that indicates that Monseñor Oscar Romero Charter Middle is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
- 27. Monseñor Oscar Romero Charter Middle did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
- 28. The 2019-2020 audited and unaudited actuals do not mirror each other. There was a variance of \$164,218 in Current Liabilities and a variance of **(\$164,133)** in Long-Term Liabilities. These variances were primarily due to the reclassification of Compensated Absences from Long-Term Liabilities to Current Liabilities and the recording of the current portion of the Charter School Facilities Program loan in Current Liabilities.

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

N/A



Fiscal Operations Rubrics

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

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

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



<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<ol style="list-style-type: none"> 13. The LCAP/Learning Continuity and Attendance Plan is submitted to the appropriate agencies; 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; 19. There are no outstanding fiscal-related tiered intervention notices issued to the school; and 20. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s). 	<ol style="list-style-type: none"> 13. The LCAP/Learning Continuity and Attendance Plan is submitted to the appropriate agencies; 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no significant recurring issues; 17. Audited and unaudited actuals nearly mirror each other; and 18. There are no outstanding fiscal-related tiered intervention notices issued to the school.
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>
<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum four of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Salary schedules/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Fiscal policies and procedures manual 	<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum four of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Salaries schedule/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Fiscal policies and procedures manual



<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<ol style="list-style-type: none"> 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and 5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting. 	<ol style="list-style-type: none"> 4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and 5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

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



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

- 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP/Learning Continuity and Attendance Plan are posted on the charter school’s website;
- 8. The LCAP/Learning Continuity and Attendance Plan is submitted to the appropriate agencies;
- 9. Have an audit conducted annually by an independent auditing firm; and
- 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

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

SUPPLEMENTAL CRITERIA

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

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

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

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



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



<i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i>	<i>A new school would be assessed as Unsatisfactory based on the statements below:</i>
<u>Note:</u> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.	<u>Note:</u> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.
<u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.	<u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.