



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2021-2022 SCHOOL YEAR

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. Elements of the oversight process may be modified as LAUSD responds to the COVID-19 pandemic. To support the well-being of all at a school site, all are expected to follow applicable COVID-19 public health guidelines, including related District requirements for operations at District facilities. The assigned Specialist will reach out with more details, as needed. Thank you.



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 Charter¹:				LAUSD Board District:	LAUSD Local District:	
July 1, 2017 to June 30, 2024				2	Central	
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:		Number Above/Below Enrollment Capacity (day of visit):		Below by 80
295		375				
Grades Currently Served:		Grades To Be Served Per Charter:		Percent Above/Below Enrollment Capacity (day of visit):		Below by 21.3%
6-8		6-8				
Norm Enrollment Number:			295			
Total Number of Staff Members:		38	Certificated:	20	Classified:	18
Charter School's Leadership Team Members:			Dr. Rene Quon, Executive Administrator; Karina Gámez, Coordinator of Operations; Freddy Zepeda, Coordinator of Instruction; Danyale Brown, Coordinator of Instruction; Ruben Dueñas, Chief Operations Officer; Yesenia Zubia, Coordinator of Human Resources and Accounts Payable;			
Charter School's Contact for Special Education:			Vashon Nutt, Director of Special Education		SELPA & Option:	3
CSD Assigned Administrator:		Dr. Blanca Alves-Monaster		CSD Fiscal Services Manager:		Cindy Delos Santos-Iya
Other School/CSD Team Members:			Yolanda Jordan (Completed visit and report)			
Oversight Visit Date(s):			May 18, 2022		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, Long-Term Lease		LAUSD Co-Location Campus(es) (if applicable):	Berendo Middle School
					Date of Co-Location meeting with Operations Team:	N/A

¹ AB 130 added Section 47607.4 to California Ed Code, which extends the term of all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, inclusive, by two years.



Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: <small>(if a TCO, please note expiration date)</small>	N/A	COO/TCO Approved Grade Levels and Occupancy Loads:	N/A
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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	No Rating	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 2021-2022*. 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 all LAUSD schools.

GOVERNANCE	RATING*
Summary of School Performance	3

Areas of Demonstrated Strength and/or Progress

G2: The Governing Board complies with all material provisions of the Brown Act as evidenced in Binder 1, Board agendas and minutes, and discussion with school leadership.

- Brown Act Training took place on April 19, 2021.
- Agenda posting procedures are compliant, including posting of current Board agenda on the school’s website

G4: The Governing Board considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) as evidenced in Binder 1, Board agenda’s and minutes, and discussion with leadership. Some items per Board minutes include:

- iReady ELA program and instructional resources approved
- iReady diagnostics updates
- Academic focus areas for this school year (Exemplars, Checks for Understanding, and Assessments)
- School Committee/Council Reports

Areas Noted for Further Growth and/or Improvement

While 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, it was discussed during the leadership meeting that the Parent Student Handbook will be updated to include the ELPAC (instead of the CELDT) and ESSA (instead of NCLB) in designated areas, as necessary.

Corrective Action Required

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

Notes: None

***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) - 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
- Governing Board seeks input from committees/councils described in the school’s charter including but not limited to those mandated by laws or regulations as applicable (e.g., SSC and ELAC)
- Evaluation of school’s executive level leadership (including, but not limited to, 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’s executive level leadership <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’s executive level leadership <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’s executive level leadership <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’s executive level leadership	<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 leadership. (B1.7) <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)



G2: BROWN ACT - 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 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 E.C. 47604.1

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"/> Compliance with E.C. 47604.1 (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 - 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 procedure (complaints outside regulatory scope of UCP)
- 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) (B1.10a) <input checked="" type="checkbox"/> Employee Handbook(s) (B1.10b) <input checked="" type="checkbox"/> Uniform Complaint Procedures policy and form(s) (B1.11) <input checked="" type="checkbox"/> Stakeholder complaint procedures and form(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: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4

The Governing Board has systems in place to ensure ongoing:

- Review and use of academic performance (e.g., CA School Dashboard, internal assessments, etc.) and other 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 and additional school plans, e.g., CSI, SPSA (action plans and progress toward LCAP goals)
- Transparent governance and accountability to stakeholders
- Monitoring of staffing needs and compliance with all applicable credentialing, clearance, and training requirements

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The Governing Board regularly considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input checked="" type="checkbox"/> The Governing Board considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom considers school performance, stakeholder input, and other 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, including but not limited to: (B1.4) <ul style="list-style-type: none"> <input type="checkbox"/> CA School Dashboard Academic Performance Indicators (ELA, MATH, ELPI, CCI) <input type="checkbox"/> CA School Dashboard Academic Engagement Indicators (Chronic Absenteeism, Graduation Rate) <input type="checkbox"/> CA School Dashboard Conditions and Climate Indicator (Suspension Rate) <input checked="" type="checkbox"/> Attendance rate <input checked="" type="checkbox"/> Internal assessment data <input checked="" type="checkbox"/> Enrollment data <input checked="" type="checkbox"/> Staffing data (retention, turnover, certification, etc.) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14a) <input type="checkbox"/> Board member training documentation (roles, responsibilities, etc.) (B1.14b) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



G5: FISCAL CONDITION - QUALITY INDICATOR #5

<i>The Governing Board has a system in place to ensure fiscal viability:</i>	
<ul style="list-style-type: none"> • The school is fiscally strong and net assets are positive in the prior two independent audit reports. • If applicable, all LAUSD Board of Education-approved fiscal condition-related benchmark(s) are met by the required deadline(s). 	
Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s) <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 or unstable**, 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, 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* <p>*Additional considerations that could influence the rating may include: inadequate cash flow, financial condition and/or enrollment reflecting a downward trend or beginning to show signs that illustrate or contribute to deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years, multi-year reliance on financing resources for the school’s operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.).</p> <p>**For example, the school’s financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years.</p>
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other financial information submitted by the school <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)



G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - QUALITY INDICATOR #6

The Governing Board has a system in place to ensure sound fiscal management and accountability:

- The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement.
- The two most current annual independent audits show no material weaknesses, deficiencies, and/or findings.

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school consistently adheres to the Governing Board approved fiscal policies and procedures, does not have any areas noted for improvement, and the two most current annual independent audits show no material weaknesses, deficiencies, and/or findings <input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement, and the most current annual independent audit shows no material weaknesses, deficiencies, and/or findings <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, unresolved recurring issues, potential conflicts of interest, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, 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)

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

N/A



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	No Rating
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> **PLEASE SEE NOTES SECTION**</p> <p><u>Areas Noted for Further Growth and/or Improvement</u> A11: The school did not reclassify any of its English Learners. Per CDE, the school reclassified 0% of English Learners, compared to the state at 6.9%.</p> <ul style="list-style-type: none"> Per school leadership, MORCS is currently investigating why the 7 students they reclassified weren’t added to the 20-21 count. Additionally, school leadership “attribute the low numbers to the limitations of being able to provide differentiated supports online (it was extremely difficult to engage ELs in conversation in this format for most of the year), combined with the difficulties associated with the online administration of the ELPAC.” In an effort to increase reclassification of English Learners, MORCS has hired an ELD teacher and opened 7 English Learner Development (ELD) sections, differentiated by literacy level this school year. <p>**PLEASE SEE NOTES SECTION**</p> <p><u>Corrective Action Required</u> None noted that require immediate action to remedy concerns indicated in this report.</p>	
<p>Notes: Due to the COVID-19 pandemic, state law suspended the reporting of state indicators on the 2021 Dashboard. Accordingly, no overall score will be issued in the Student Achievement and Educational Performance category for the 2021-2022 Annual Performance-Based Oversight Report. Please note that, although the overall Student Achievement and Educational Performance category is not scored, Indicator A11: English Learner Reclassification below is scored based on 2020-2021 reclassification data.</p> <p>Rate of “At Risk” ELs is 3.3%, compared to the state average of 10.1% Rate of “LTEL” is 29.4%, compared to the state average of 17.1%</p>	

**Reclassification Criteria:**

- Overall ELPAC Performance Level 4
- Teacher evaluation, including, but not limited to, a review of student's curriculum mastery (C or better (end of semester grade)
- Parent opinion and consultation (parent must agree and sign letter)
- Performance in Basic Skills
 - Standard Met or Standard Exceeded on the English Language Arts Smarter Balanced Assessment **OR**
 - Score of Basic, Proficient, or Advanced on the Reading Inventory (RI) assessment score **OR**
 - Score in the Tier 1 Range (Early On Grade Level or above) or the iReady Diagnostic Assessment with a Lexile score that is at grade level

As a school being identified as having ATSI status, MORCS has implemented the following interventions: Multi-tiered systems of supports (MTSS); Differentiated Instruction (iReady); EL teacher/tutors; Morning Resource Lab; and Bi-weekly check-ins with resource team PLC. Some of the successes noted by MORCS include the following:

- Using iReady diagnostics results to clearly identify individual and group levels of proficiency and need in Math and Reading
- The hiring of an ELD teacher year and the opening of 7 ELD sections differentiated by literacy level in 21-22 school year.
- Creating a morning resource lab where students with IEPs have additional targeted support by the entire resource team.

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



A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> 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; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Red <input type="checkbox"/> Not Available - No color assigned for the ELA Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> 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; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Red <input type="checkbox"/> Not Available - No color assigned for the Math Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - 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; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard ELPI color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard ELPI color is Red <input type="checkbox"/> Not Available - No color assigned for the ELPI on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input type="checkbox"/> Other: (Specify)

A4: DASHBOARD SCHOOLWIDE COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - 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; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard CCI color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard CCI color is Red <input type="checkbox"/> Not Available - No color assigned for the CCI on the Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - 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 type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is either Red <input type="checkbox"/> Not Available - No color assigned for the Chronic Absenteeism Indicator on the Dashboard <input type="checkbox"/> Not Applicable - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR - 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; or Yellow and at/below statewide percentage <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Yellow and above statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Red <input type="checkbox"/> Not Available - No color assigned for the Suspension Rate Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR - (GRADES 9-12) - 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
Performance	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Blue	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> 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)
	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Green; or Yellow and at/above statewide percentage	
	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Yellow and below statewide percentage; or Orange	
	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Red	
	<input type="checkbox"/> Not Available - No color assigned for the Graduation Rate Indicator on the Dashboard	
	<input type="checkbox"/> Not Applicable - Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school	

A8: DASHBOARD SUBGROUP ELA - 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, Socioeconomically Disadvantaged, etc.)(CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All numerically significant subgroups have "Status/Distance From Standard (DFS)" scores above the statewide averages	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)
	<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"/> Not Available - No assessment of performance for this indicator	



A9: DASHBOARD SUBGROUP MATH - 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, Socioeconomically Disadvantaged, etc.)(CDE) 		
Rubric		Sources of Evidence
Performance	<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"/> Not Available - No assessment of performance for this indicator	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> 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) - 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 Socioeconomically Disadvantaged, etc.)(CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> The majority of numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> None of the school’s numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> Not Available - No assessment of performance for this indicator <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A11: ENGLISH LEARNER RECLASSIFICATION - QUALITY INDICATOR #11

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

- English Learner reclassification rate for 2020-2021 (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 type="checkbox"/> The school reclassifies English Learners at a rate lower than the state average <input checked="" type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> Not Available - The school did not have any English Learners <input type="checkbox"/> Not Applicable - No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (Additional info within "Notes" section above) (B2.4) <input checked="" type="checkbox"/> Rate of "At Risk" ELs in comparison to the state average <ul style="list-style-type: none"> <input type="checkbox"/> Higher <input type="checkbox"/> Same <input checked="" type="checkbox"/> Lower (Additional info within "Notes" section above) <input checked="" type="checkbox"/> Rate of "LTELs" in comparison to the state average <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Higher <input type="checkbox"/> Same <input type="checkbox"/> Lower (Additional info within "Notes" section above)



A12: VERIFIED DATA - PERFORMANCE QUALITY INDICATOR #12

VERIFIED DATA

For Informational Use (Not Scored at This Time)

The information provided on verified data is to determine the charter school’s verified data implementation. The renewal criteria for charter schools identified by the CDE as Middle and Low performing shall include the consideration of clear and convincing data, demonstrated by verified data, showing either of the following: (a) The charter school achieved measurable increases in academic achievement, as defined by at least one year’s progress for each year in school, or (b) Strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates equal to similar peers (Ed. Code, § 47607(c)(2)(B).

The information below is based on charter school’s self-reported data and responses to questions provided prior to the oversight visit.

The State Board of Education (SBE), at its November 2020 meeting, approved the criteria to define verified data and the list of valid and reliable assessments and measure of postsecondary outcomes (<https://www.cde.ca.gov/sp/ch/verifdata.asp>). The charter school identified the academic progress indicator(s) (verified data) used by the charter school during the 2021-2022 academic school year.

- | | | |
|---|--|--|
| <input type="checkbox"/> Adaptive, Diagnostic Assessment of Mathematics (ADAM)/Diagnostic Online Math Assessment (DOMA) by Let’s Go Learn | <input type="checkbox"/> FastBridge by Illuminate | <input type="checkbox"/> RAPID by Lexia Learning |
| <input type="checkbox"/> California Assessment of Student Performance and Progress (English Language Arts/Literacy and Mathematics) (methodology mutually agreed upon by the chartering authority and charter school) | <input checked="" type="checkbox"/> iReady by Curriculum Associates | <input type="checkbox"/> Reading Inventory by Houghton Mifflin Harcourt |
| <input type="checkbox"/> Diagnostic Online Reading Assessment (DORA) by Let’s Go Learn | <input type="checkbox"/> Math Inventory by Houghton Mifflin Harcourt | <input type="checkbox"/> SAT Suite by College Board |
| <input type="checkbox"/> easyCBM by Riverside Insights | <input type="checkbox"/> mCLASS by Amplify | <input type="checkbox"/> Star Assessments by Renaissance |
| <input type="checkbox"/> ELPAC by Educational Testing Service | <input type="checkbox"/> Measures of Academic Progress by NWEA | <input type="checkbox"/> The school is not using a state approved verified data (see Verified Data Notes below): |



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

Verified Data Assessment	Grade Levels Assessed	95% Participation Rate (Met/Not Met)	Frequency of Administration of Verified Data Assessment
1. iReady (ELA)	6-8	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	3x per school year
2. iReady (Math)	6-8	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	3x per school year

If the charter school did not meet the 95% participation rate, the charter school provided the following plan to address participation rate as follows: N/A

The charter school disaggregated student performance data for the subgroups: Yes No

If applicable, the charter school provided disaggregated student performance data for the following subgroups:

- | | | |
|---|--|--|
| <input type="checkbox"/> American Indian or Alaska Native | <input type="checkbox"/> Foster Youth | <input checked="" type="checkbox"/> Students with Disabilities |
| <input type="checkbox"/> Asian | <input type="checkbox"/> Homeless | <input type="checkbox"/> Two or More Races |
| <input type="checkbox"/> Black or African American | <input type="checkbox"/> Latino | <input type="checkbox"/> White |
| <input checked="" type="checkbox"/> English Learner | <input type="checkbox"/> Native Hawaiian or Pacific Islander | |
| <input type="checkbox"/> Filipino | <input type="checkbox"/> Socioeconomically Disadvantaged | |

The charter school provided the following description of how the school implemented protocols to ensure the assessment(s) are administered as intended:

Per MORCS, “each test was administered within a 3-week window (to ensure validity of growth comparison between distinct testing windows). Test proctors were trained in setting expectations to ensure students had no additional supports, from either staff members, peers, nor outside resources such as posters or websites that could provide an unfair advantage. The test was administered online using a secure browser setting which did not allow communication nor web browsing. Finally, student electronics were collected at the beginning of each testing session, including cell phones and smart watches. The test itself is adaptive, which minimizes the ability for students to discuss common questions during break times.”

The charter school affirmed that the assessments were administered as intended, consistent with the test’s publishers’ administration and test security procedures:

- Yes No



HIGH SCHOOLS ONLY:

The California Department of Education (CDE) adopted postsecondary indicator(s) data to be used by the school to verify postsecondary outcomes “as defined by college enrollment, persistence, and completion... equal to similar peers.” The school is using the following data source(s):

- California Department of Education DataQuest College-Going Rate
- National Student Clearinghouse Student Tracker
- University of California Undergraduate Graduation Rates
- California State University Enrollment Dashboard Student Origin
- University of California Admissions by School Source
- The school is not using a state identified data sources (see Verified Data Notes below):
- Cal-PASS Plus High School to Community College Transition Report

The postsecondary data includes the results of at least 95% percent of eligible students: Yes No

The postsecondary data includes the number of missing or non-participating students: Yes No

The charter school provided evidence of comparing the data to similar peers (which may include, but not limited to, similar demographics, pupil subgroups, first-time college attendance, or other similar circumstances and if not available, comparison to statewide data): Yes No

Verified Data Notes:

Per MORCS:

Based on the mid-year data in Reading:

- Overall and at each grade level, all students are projected to achieve over 100% growth by the end of the school year. In the case of 7th grade ELA, students are projected to achieve 248% median growth by the end of the year!
- 98% of all students are projected to meet their typical growth in Reading by the end of the school year
- 96% of all students are projected to improve their placement in Reading by at least one band by the end of the school year

Median Progress towards Annual Typical Growth for subgroups (Midyear) in Reading are as follows:

- 122% for English Learners (ELs)
- 153% of Students with Disabilities (SWD)

Based on the mid-year data in Math:

- Overall and at each grade level, all students are projected to achieve over 100% growth by the end of the school year. In the case of 8th grade Math, students are projected to achieve 216% median growth by the end of the year!
- 84% of all students are projected to meet their typical growth in Math by the end of the school year



● 96% of all students are projected to improve their placement in Math by at least one band by the end of the school year
 Median Progress towards Annual Typical Growth for subgroups (Midyear) in Math are as follows:

- 99% of ELs
- 54% of SWD

Diagnostic 2 (Midyear) reveals that 49% of all students met the Typical Growth in Reading and 18% in Stretch Growth. In Math, 42% met Typical Growth and 9% met Stretch Growth.

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

N/A

LOCAL CONTROL ACCOUNTABILITY PLAN 2021-2022 (For Informational Purposes Only)

The CSD reviewed the Local Control Accountability Plan.

All requested template information and descriptions were provided:	Sources of Evidence
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Annual Update for the 2019-202 LCAP Year <input checked="" type="checkbox"/> Annual Update for the 2020-2021 Learning Continuity and Attendance Plan <input checked="" type="checkbox"/> 2021-2024 Plan Summary <input checked="" type="checkbox"/> Stakeholder Engagement <input checked="" type="checkbox"/> Goals and Actions <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students <input checked="" type="checkbox"/> Expenditures Tables 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Local Control Accountability 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>O3: The school has substantially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served as evidenced in Binder 3, leadership discussion, and responses to guiding questions. Some of the information shared by school leadership includes the following:</p> <ul style="list-style-type: none"> • Adoption of resources and tools, such as iReady ELA and Math curriculum and use of NewsELA to provide varied reading material for students to enhance their reading comprehension and critical thinking • Continued use of Standards Based Grading for Mastery • Technology tools used for instruction continue to include Nearpod, Peardeck, and Kami • Continued use of critical friends groups protocols <p>Checks for understanding by teacher and other support staff, sharing of exemplars, and iReady curriculum were observed during classroom observations.</p> <p>O4: The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis as evidenced in Binder 3, leadership discussion, and responses to guiding questions. Some of the information shared by school leadership includes the following:</p> <ul style="list-style-type: none"> • Success For All strategies continue to be implemented across the curriculum to enhance reading, writing, and collaboration skills for all students • An ELD Teacher was hired this school year, as well as seven (7) ELD sections were added, differentiated by literacy level • Implementation of EL snapshots to create individualized goals and accommodations for all English Learners • Opened 5 math support sections for students in order to receive additional support time during the school day via small group instruction <p>O6: 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 as evidenced in Binder 3, leadership discussion, and responses to guiding questions. Some of the information shared by school leadership includes the following:</p> <ul style="list-style-type: none"> • Alternatives to Suspension (i.e., Fight Response Protocol, etc.) • Data Monitoring (i.e., behavior summary) • Implementation of Positive Behavior Intervention Systems (PBIS) • Implementation of restorative practices • Provision of socio-emotional learning during advisory time, using resources from Nearpod and other teacher-developed materials <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>Per MORCS leadership, “...our overall mindset in creating action plans for improvement at this point is focused on 1) gathering data on the current state of affairs with regards to that area of growth, 2) meeting with the appropriate team and stakeholders in order to identify the highest-impact actions that will lead to significant</p>	



improvement, 3) making a strategic plan (using the following resource: Strategic Planning Process.pdf) to execute those actions, and 4) making plans to review our progress in order to ensure that we are always making steady progress with regards to implementation of that strategic plan.”

Corrective Action Required

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

Notes: None

***NOTE:**

- *A charter school cannot receive a rating in this category greater than 1 for any of the following reasons: (1) Failed to complete criminal background clearances for any new staff and/or sole proprietor (as defined on the Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; or (2) Failed to have Health, Safety, and Emergency Plan in place.*
- *A charter school cannot receive a rating in this category greater than 2 for any of the following reasons: (1) Failed to conduct child abuse mandated reporter training in accordance with Education Code 44691; or (2) 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 PLAN AND PROCEDURES - QUALITY INDICATOR #1

The school has a system in place to ensure:

- A current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- A current site-specific comprehensive Health, Safety, and Emergency Plan is completed
(**Note:** for co-locations, the charter school adheres and complies with the District school’s Integrated Safe School Plan)
- A visitor’s policy is visible in the school's main office and Parent-Student Handbook
- Documentation of student immunizations
- Documentation of health screenings 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)
- A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), as outlined in Ed. Code, § 215
- Needy students receive one nutritionally adequate free or reduced priced meal each school day, as outlined in Ed. Code, § 47613.5
- For schools offering an interscholastic athletic program, at least one automated external defibrillator (AED) is onsite and available for use, as outlined in Ed. Code, § 35179.4 and 35179.6
- For schools serving grades 7-12, Student ID cards have the phone number of the National Suicide Prevention Lifeline printed on at least one side, as outlined in Ed. Code, § 215.5

Rubric	Sources of Evidence
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Performance	<input type="checkbox"/> The school has a highly developed system in place to ensure the protection of student and staff health and safety in 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 in 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 in 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 in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a) <input checked="" type="checkbox"/> Student immunization (B3.2b) <input checked="" type="checkbox"/> Health screening (B3.2b) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <input type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.2f) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1g) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Visitor's Policy (B3.1a) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O2: HEALTH AND SAFETY TRAINING AND PREPARATION – QUALITY INDICATOR #2

The school has a system in place to ensure:

- 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, as outlined in Ed. Code, § 44691
- Maintenance of an emergency epinephrine auto-injector (“epi-pen”) onsite and training has been provided to volunteer staff member(s) in the storage and emergency use of the epi-pen, per applicable laws
- Pupil Suicide Prevention and Awareness Training (as applicable)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input checked="" type="checkbox"/> The school has a well-developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety	<input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.5) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.5) <input checked="" type="checkbox"/> Pupil Suicide Prevention and Awareness Training (B3.1f, g and B3A.5) <input checked="" type="checkbox"/> Epi-pen and training (B3.2c) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022 (“ESSA Grid”)</i> (B3A.1) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O3: IMPLEMENTATION OF THE EDUCATIONAL PROGRAM- QUALITY INDICATOR #3

The school has systems in place to ensure alignment to the curricular and educational program outlined in the approved charter petition by:

- Implementing key features of the educational program described in the charter
- Implementing standards-based instruction schoolwide in accordance with the California State Content Standards specific to the grade levels served and aligned with the needs of students
- Implementing assessments to measure the development of grade-level appropriate academic and non-academic skills
- Reviewing progress towards annual goals for all students and subgroups the school serves consistent with educational outcomes detailed in the California School Dashboard
- Providing teacher, staff, and administrator professional development specific to supporting desired student outcomes and key features outlined in the school’s charter
- Implementing a system to monitor student progress toward and completion of graduation and A-G requirements (**high schools only**)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has fully implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input checked="" type="checkbox"/> The school has substantially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has partially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has minimally implemented, or not at all, the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served	<input checked="" type="checkbox"/> Implementation of an educational program serving all grade levels approved to be served per charter (B3.3i, j, k) <input checked="" type="checkbox"/> California State Content Standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.3c) *new schools only <input type="checkbox"/> WASC accreditation (B3.3d) <input type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> 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 - QUALITY INDICATOR #4

<i>The school has a system in place to ensure:</i>	
<ul style="list-style-type: none"> • Implementation of differentiated instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all numerically significant subgroups identified in the school’s LCAP and by the CDE • Implementation of internal student assessments aligned with instructional outcomes to determine student mastery of California State Content Standards • Disaggregation and analysis of data on a regular basis to address individual student needs and guide instructional planning and use of interventions • Implementation, review, and modification, as appropriate, of its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification) • A staff person is designated to assist and support foster youth/students experiencing homelessness 	
Performance	Sources of Evidence
<p style="text-align: center;">Rubric</p> <p><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</p> <p><input checked="" type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis</p> <p><input type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis</p> <p><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</p>	<p style="text-align: center;">Sources of Evidence</p> <p><input checked="" type="checkbox"/> Standards-based instructional program (B3.3a)</p> <p><input checked="" type="checkbox"/> LCAP (B3.3b)</p> <p><input checked="" type="checkbox"/> Professional development documentation (B3.4c)</p> <p><input checked="" type="checkbox"/> Intervention and support for all students, including but not limited to foster youth, low-income, English Learners, students with disabilities, at-risk students, and high performing students (B3.3i)</p> <p><input checked="" type="checkbox"/> Implementation of the school’s English Learner Master Plan (B3.3i)</p> <p><input checked="" type="checkbox"/> Implementation of a data analysis system (B2.1 and B2.6)</p> <p><input checked="" type="checkbox"/> Internal assessment and analysis documentation (e.g., School Internal Assessment Data Report or equivalent) (B2.6)</p> <p><input type="checkbox"/> Foster youth/students experiencing homelessness designee</p> <p><input checked="" type="checkbox"/> Classroom observation</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



O5: SPECIAL EDUCATION - QUALITY INDICATOR #5

The school has a system in place to ensure that the school:

- 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

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <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 type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input type="checkbox"/> District Validation Review (DVR) (B3.4a) <input checked="" type="checkbox"/> Self-Review Checklist (B3.4a) <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.4a) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.3i) <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Other special education documentation (B3.4a) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> MOU Non-LAUSD SELPA <input type="checkbox"/> Other: (Specify)



O6: SCHOOL CLIMATE AND STUDENT DISCIPLINE - QUALITY INDICATOR #6

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
- Minimize chronic absenteeism for all students and student subgroups
- Procedures for preventing acts of bullying, including cyberbullying, in accordance with the requirements of Ed. Code, § 32283.5 and 234.4

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input checked="" type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.4b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention, such as SST/COST (B3.4b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.4b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.4b) <input checked="" type="checkbox"/> Data monitoring (B3.4b) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input type="checkbox"/> Chronic absenteeism rates <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.4b) <input type="checkbox"/> Stakeholder focus group <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7

<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 year-long plan agendas, and sign-ins) (B3.4c) <input checked="" type="checkbox"/> Professional development training materials (B3.4c) <input type="checkbox"/> System to assess professional development needs (B3.4c) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O8: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR #8

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

- 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
- Implements a School Site Council (SSC) and/or English Learner Advisory Committee (ELAC), in accordance with legal requirements (e.g., member composition of committee/council, legally required topics, etc.), if applicable
- 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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.4d) <input checked="" type="checkbox"/> Stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Stakeholder focus group <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O9 TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

The school's documents that are available both manually and electronically 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
- Applicable categories described in Charter School Transparency Resolution
- UCP and all complaint procedures
- Title IX information in accordance with Ed. Code, § 221.61**
- Suicide Prevention policy in accordance with Ed. Code, § 215**
- 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, in accordance with Ed. Code, § 49428
- 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, in accordance with Ed. Code, § 234.1 et seq.**
- Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance
- Identifies and implements the most appropriate methods of informing parents and guardians of pupils in grades 6-12, of human trafficking prevention resources, in accordance with Ed. Code, § 49381
- 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**)

*** Indicates that the policy must be posted on website.

Rubric	Sources of Evidence
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Performance	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP <input checked="" type="checkbox"/> UCP Procedure and Forms <input type="checkbox"/> Complaint Procedure and Forms <input checked="" type="checkbox"/> Title IX Information <input checked="" type="checkbox"/> Suicide Prevention and Awareness <input checked="" type="checkbox"/> Financial Audit <input type="checkbox"/> Student Demographics <input type="checkbox"/> Student Achievement Information <input checked="" type="checkbox"/> Sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4e) <input type="checkbox"/> Parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4e) <input checked="" type="checkbox"/> Provision of stakeholder access to school's approved charter (B3.4e) <input checked="" type="checkbox"/> Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.4e) <input checked="" type="checkbox"/> Notification of access to available mental health services (B3.4e) <input checked="" type="checkbox"/> Specified information on bullying and harassment prevention (B3.4e) <input checked="" type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

<p><i>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 and complies with all applicable legal requirements, including:</i></p> <ul style="list-style-type: none"> • Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff • Evaluation tool for all school-based staff, including but not limited to administrators, certificated staff, and classified staff 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f) <input checked="" type="checkbox"/> Evaluation tool for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

<p><i>The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:</i></p> <ul style="list-style-type: none"> • 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 obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code, § 47605.4(a).) • The charter school maintains appropriate assignments and monitoring throughout the year and addresses Exceptions (and makes Determinations, as appropriate) in CalSAAS during the CTC-identified annual window. • Charter school identifies its charter user(s) who participate in CTC trainings as well as those through LACOE and/or LAUSD, and they establish internal processes that address not only the CalSAAS monitoring, but also the accurate submission of CALPADS Codes as they relate to the CalSAAS Determinations. • 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 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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Human Resources policies and procedures regarding ESSA qualifications and credentialing requirements <input checked="" type="checkbox"/> CalSAAS detail and summary reports; HR procedures for the CalSAAS; List of CalSAAS users who actively engage in the assignment monitoring process <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, B3A.3, and B3A.4) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.6) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.7) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

N/A



Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/18/2022

Location Code: **8196**
 School Name: **Monseñor Oscar Romero Charter Middle**
 FY Start Date: **2007-08**

Charter #: **0931**
 CDS Code: **1964733 0114959**

8196 Monseñor Oscar Romero Charter Middle	2018-2019					2019-2020					2020-2021				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents		0	1,601,636	2,788,432	2,788,433		2,463,044	2,403,782	2,889,742	2,889,828		1,442,763	1,471,791	3,117,069	3,116,608
Current Assets		0	2,242,231	3,350,157	3,350,158		3,050,966	3,036,562	3,605,738	3,605,823		3,293,151	3,291,693	4,387,659	4,347,764
Fixed and Other Assets		0	30,279,989	28,913,251	28,913,251		28,318,362	28,316,644	28,243,018	28,243,018		27,430,967	27,473,415	27,474,708	27,474,708
Total Assets		0	32,522,220	32,263,408	32,263,409		31,369,328	31,353,206	31,848,756	31,848,841		30,724,118	30,765,108	31,862,367	31,822,472
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	605,702	1,136,672	1,159,164		986,426	919,670	1,301,700	1,465,918		925,284	941,197	1,832,597	1,877,666
Other Long Term Liabilities		0	7,772,940	7,844,033	7,821,628		7,672,652	7,672,652	7,691,150	7,527,017		7,495,024	7,495,023	7,361,973	7,321,254
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		0	8,378,642	8,980,704	8,980,792		8,659,077	8,592,322	8,992,850	8,992,935		8,420,308	8,436,220	9,194,570	9,198,920
Net Assets		24,643,712	24,143,578	23,282,704	23,282,617		22,710,251	22,760,884	22,855,906	22,855,906		22,303,810	22,328,888	22,667,797	22,623,552
Total Revenues	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	4,299,621	5,155,874	4,981,163	4,938,883	4,899,448
Total Expenditures	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	5,009,355	5,707,970	5,508,181	5,126,992	5,131,802
Net Income / (Loss)	133,321	7,615,112	7,114,977	5,932,015	5,931,931	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)	(709,734)	(552,096)	(527,018)	(188,109)	(232,354)
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	133,321	7,615,112	7,114,977	5,932,015	5,931,931	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)	(709,734)	(552,096)	(527,018)	(188,109)	(232,354)
Net Assets, Beginning	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	22,760,884	22,855,906	22,855,906	22,855,906	22,855,906
Adj. for restatement / Prior Yr Adj	0	0	0	322,089	0	(498,852)	0	(87)	(87)	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	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	22,760,884	22,855,906	22,855,906	22,855,906	22,855,906
Net Assets, End	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	22,051,150	22,303,810	22,328,888	22,667,797	22,623,552

8196 Monseñor Oscar Romero Charter Middle	Audited Financials					2021-2022				
	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	5,461,380	2,788,433	2,889,828	3,116,608	0		3,396,741	3,301,528	0	0
Current Assets	5,882,314	3,350,158	3,605,823	4,347,764	0		3,991,193	4,047,784	0	0
Fixed and Other Assets	23,423,020	28,913,251	28,243,018	27,474,708	0		26,669,528	26,669,001	0	0
Total Assets	29,305,334	32,263,409	31,848,841	31,822,472	0		30,660,721	30,716,785	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	4,106,556	1,159,164	1,465,918	1,877,666	0		1,175,004	1,282,274	0	0
Other Long Term Liabilities	7,848,092	7,821,628	7,527,017	7,321,254	0		7,165,847	7,165,846	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	11,954,648	8,980,792	8,992,935	9,198,920	0		8,340,851	8,448,120	0	0
Net Assets	17,350,686	23,282,617	22,855,906	22,623,552	0		22,319,870	22,268,665	0	0
Total Revenues	16,645,758	11,223,654	4,702,563	4,899,448	0	4,613,811	5,234,964	5,467,836	0	0
Total Expenditures	3,916,616	5,291,723	5,129,274	5,131,802	0	5,395,994	5,578,167	5,822,723	0	0
Net Income / (Loss)	12,729,142	5,931,931	(426,711)	(232,354)	0	(782,183)	(343,203)	(354,887)	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	12,729,142	5,931,931	(426,711)	(232,354)	0	(782,183)	(343,203)	(354,887)	0	0
Net Assets, Beginning	4,621,544	17,350,686	23,282,617	22,855,906	0	22,328,888	22,667,797	22,667,797	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	34,356	(4,724)	(44,245)	0	0
Net Assets, Beginning, Adjusted	4,621,544	17,350,686	23,282,617	22,855,906	0	22,363,244	22,663,073	22,623,552	0	0
Net Assets, End	17,350,686	23,282,617	22,855,906	22,623,552	0	21,581,061	22,319,870	22,268,665	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>Monsenor Oscar Romero Charter Middle’s fiscal condition has been positive since the 2017-2018 fiscal year. According to the 2020-2021 independent audit report, the school had positive net assets of \$22,623,552 and a net loss of (\$232,354). The 2021-2022 Second Interim projected positive net assets of \$22,268,665 and a net loss of (\$354,887).</p> <p>According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2021, Monsenor Oscar Romero Charter Middle is one of three schools operated by YPICS, all of which are authorized by the Los Angeles Unified School District (LAUSD). YPICS and its charter schools reported positive net assets of \$25,911,942 and a net loss of (\$113,282). YPICS attributed its net loss to its building depreciation expense. YPICS’s 2020-2021 independent audit report shows total depreciation expense in the amount over \$1.14 million. YPICS, without its charter schools, reported negative net assets of (\$16,373) and net income of \$0. The organization attributed the reported negative net assets to home office staff’s accrued vacation expenses in 2019-2020. According to YPICS, there are no management fees charged to Monsenor Oscar Romero Charter Middle or 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																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: center;">2017-2018 (Audited Actuals)</th> <th style="text-align: center;">2018-2019 (Audited Actuals)</th> <th style="text-align: center;">2019-2020 (Audited Actuals)</th> <th style="text-align: center;">2020-2021 (Unaudited Actuals)</th> <th style="text-align: center;">2021-2022 (Second Interim)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Net Assets</td> <td style="text-align: right;">\$17,350,686</td> <td style="text-align: right;">\$23,282,617</td> <td style="text-align: right;">\$22,855,906</td> <td style="text-align: right;">\$22,623,552</td> <td style="text-align: right;">\$22,268,665</td> </tr> <tr> <td style="text-align: center;">Net Income/Loss</td> <td style="text-align: right;">\$12,729,142¹</td> <td style="text-align: right;">\$5,931,931¹</td> <td style="text-align: right;">(\$426,711)²</td> <td style="text-align: right;">(\$232,354)²</td> <td style="text-align: right;">(\$354,887)³</td> </tr> <tr> <td style="text-align: center;">Transfers In/Out</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> <tr> <td style="text-align: center;">Prior Year Adjustment(s)</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> </tbody> </table>				2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Unaudited Actuals)	2021-2022 (Second Interim)	Net Assets	\$17,350,686	\$23,282,617	\$22,855,906	\$22,623,552	\$22,268,665	Net Income/ Loss	\$12,729,142 ¹	\$5,931,931 ¹	(\$426,711)²	(\$232,354)²	(\$354,887)³	Transfers In/ Out	\$0	\$0	\$0	\$0	\$0	Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
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¹The significant increases in the school’s fiscal operational results for Fiscal Years 2017-2018 and 2018-2019, respectively, were primarily due to Proposition 1D funds received in Fiscal Year 2017-2018 and prior year, and LAUSD Augmentation Grant funds received in Fiscal Year 2018-2019.

² The operating losses reported for Fiscal Years 2019-2020 and 2020-2021 were primarily due to \$819,474 and \$819,372 in depreciation expenses (non-cash in nature) for the respective years, recognized in relation to the school’s Proposition 1D property.

³The projected net loss for Fiscal Year 2021-2022 is primarily due to \$820,092 depreciation expenses (non-cash in nature) relating to the school’s Proposition 1D property, 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’s Fiscal Policies and Procedures. Any areas noted for further growth and/or improvement relating to YPICS’s 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 60 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 August 31, 2021 through January 31, 2022, the CSD noted 11 checks that, as of January 31, 2022, had been outstanding for 60 days or more. Details regarding these checks are provided below. This is a recurring issue cited in the school’s 2020-2021 Annual Performance-Based Oversight Report.

Item #	Acct. # Ending in	Check #	Check Issuance Date	Payee	Check Amount	Number of Days Check Outstanding (As of 1/31/2022)	Transaction Description
1	X6905	310109	6/29/2021	School Employee	\$134.54	216	Reimb -TB Test & Livescan
2	X6905	310100	6/29/2021	School Employee	\$250.53	216	Culmination Supplies



3	X6905	310181	7/28/2021	School Employee	\$27.50	187	Reimb - USPS
4	X6905	310257	8/18/2021	School Employee	\$60.62	166	Classroom Supplies
5	X6905	310334	9/17/2021	School Employee	\$31.28	136	Food For Teachers' Training
6	X6905	310449	11/2/2021	Employee	\$35.54	90	REINFORCED PACKET FOLDERS
7	X6905	310441	11/2/2021	Employee	\$128.12	90	FOOD FOR STAFF ON PARENT CONFERENCE
8	X6905	310481	11/30/2021	Employee	\$45.59	62	20 - 21 STRS EXCESS REFUND
9	X6905	310478	11/30/2021	Employee	\$6.03	62	20 - 21 STRS EXCESS REFUND
10	X6905	310477	11/30/2021	Employee	\$36.64	62	20 - 21 STRS EXCESS REFUND
11	X6905	310471	11/30/2021	Employee	\$46.23	62	20 - 21 STRS EXCESS REFUND
Total					\$802.62		

Page 13 under of YPICS’s Fiscal Policies and Procedures (Approved 9/27/2021) states: “Nvoicepay will stale date payments after 60 days. When this situation happens, Nvoicepay will void the payment and credit the funds back to the organization's bank account. ExED may also direct Nvoicepay to reissue a payment prior to the 60-day deadline. In this case, Nvoicepay will void the original payment and issue a new payment. The new payment will be recorded as a payment modification and will be linked to the original payment in Nvoicepay.”

As of the writing of this report, the school had not provided the CSD with an action plan for improvement.

The CSD recommends that the school review its fiscal policies and procedures regarding reviewing and resolving outstanding checks over specific periods of time instead of re-issuing outstanding checks perpetually. The CSD further recommends that the charter operator and its back office provider adhere to its fiscal policies and procedures, and provide continuing 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 (Recurring Issue):

Based on the CSD’s review of the school’s check register for the period spanning from March 2021 through February 2022, a sample of 23 checks were selected for further review. The CSD noted two 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 Chargers
1	310577	2/17/2022	Quadient Finance USA, Inc.	Finance charge	\$42.70	\$42.70
2	310583	2/22/2022	Ricoh USA Inc.	Late fee	\$293.41	\$11.50
Total					\$336.11	\$54.20

According to YPICS, “Quadient Finance USA has a short turnaround time and they refuse to set up for automatic payment. However, their monthly fees are much lower than other vendors even with the finance charges.” YPICS has stated that they would continue to search for another vendor that will allow automatic payments and has lower rates than the current vendor. As to Ricoh USA Inc., YPICS stated that, “the late fee is related to staff being on winter break and the delay in issuing payment for January invoice.” YPICS has stated they plan to hire an additional part-time employee to the Learning and Support Center and this additional staff would help eliminate potential issues with invoice processing.

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. Noncompliance with School’s Fiscal Policies and Procedures – Lack of Bidding Documentation and Board Approval (Contracts):

Based on the CSD’s review of a sample of 23 checks and bank debit transactions, and supporting documentation, the CSD noted that Check #310101 for \$79,577 (3 invoices), dated 6/26/2021 and issued to Sky Sportswear, lacked competitive bidding documentation and evidence of contract approvals by the governing board.

Item #	Invoice #	Invoice Date	Vendor	Transaction Description	Check Amount
1	5045	5/27/2021	Sky Sportswear	Masks, blankets	\$2,320.00
2	5120	6/04/2021	Sky Sportswear	Student Uniforms	\$44,469.50
3	5156	6/08/2021	Sky Sportswear	Student Uniforms	\$32,787.50
Total					\$79,577.00

Pages 9-10 of YPICS’ Fiscal Policies and Procedures, under Purchases and Procurement, state: “All purchases must be authorized by the Executive Director, Chief Operations Officer, or Executive Administrator/Assistant Executive Administrator. Any expenditure in excess of \$10,000 for the purchase of a single item should have bids from three (3) suppliers if possible.” It also states that, “The Governing Board must approve any contract over \$50,000.”



During the 2021-2022 fiscal oversight visit, YPICS’ back office provider, ExED, responded to the CSD that the YPICS governing board reviewed the check register that included check #310101 at the 07/26/21 board meeting and that the payment was for separate purchases, each for less than \$50K. The YPICS’s back office provider also mentioned that the school did have a discussion with the governing board regarding this purchase but did not document the conversation in the board meeting minutes. YPICS has stated that for purchases over \$50,000, staff will present board informative to the YPICS Board of Directors, in addition to reviewing the check register.

The CSD recommends that the school, YPICS and its back office provider strictly adhere to its written policies pertaining to purchases and/or its procurement processes referenced above, including, but not limited to, ensuring that complete vendor contracts or agreements and/or competitive bidding documents are maintained and are readily accessible (including all related exhibits), that clearly define work to be performed at the time the contracts/agreements are executed and/or support that vendors are properly selected and contracted based on the school’s governing board-approved procurement policies and procedures.

Additionally, it is the CSD’s view that the contracts for purchases from the same vendors within the same fiscal year that exceed the YPICS established threshold (i.e., \$50,000) be reviewed and approved by its governing board so not to bypass the spirit of YPICS’ governing board role in reviewing and approving contracts. The CSD recommends that YPICS strictly adhere to its written policies pertaining to contract threshold amounts and approvals referenced above.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD’s recommendations concerning the above-noted findings and observations should be discussed at YPICS’ next governing board meeting, highly preferably no later than 90 days following the school’s receipt of this report. It is the school’s responsibility to provide the CSD its action plans/steps, proof of implementation of the mitigating actions taken by the school, and/or documentation (e.g., governing board meeting agendas and approved board meeting minutes, etc.), as applicable, prior to or during the next Annual Performance-Based Oversight Visit. The CSD will continue to monitor these issues through oversight.

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

1. Public Posting of Audited Financial Statements:

Monseñor Oscar Romero Charter Middle has not posted its Fiscal Year 2020-2021 Audited Financial Statements on the school’s website. YPICS’ Executive Director stated in her response to the CSD on June 9, 2022 that the audit is available for public viewing and may be requested during office hours at the school office and that state statute does not require the audit to be posted on the website. Additionally, YPICS’ Executive Director shared that the audit was also available for the public during the YPICS board meeting in January 2022 when the audit report was on the governing board agenda.

In order to enhance transparency to the members of public and other stakeholders interested in the school’s finances, the CSD recommends that Monseñor Oscar Romero Charter Middle post its current and future Audited Financial Statements on its website even though it is not required by law.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Monseñor Oscar Romero

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/18/2022

The CSD will continue to monitor the issue referenced above in the “Other Observations” section prior to or during the next oversight visit. The results may be factored into the school’s rating for next year.	
Corrective Action Required: None noted that require immediate action to remedy concerns in this report.	



Notes:

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2021 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: None Reported
 - d. Lack of 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 2021-2022 budget were provided.
4. Evidence of Monsenor 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 2020-2021 audit report, the school's unrestricted ending fund/net asset balance is \$22,623,552 and total expenditures equal \$5,131,802. Therefore, the school's reserve for economic uncertainty as defined in California Code of Regulations (CCR), Title 5, Section 15450 is 440.85%, which exceeds the minimum 5% based on the school's Average Daily Attendance (ADA) of 274.20 per the school's 2021-2022 Second Principal Apportionment data reported.
8. Per the 2020-2021 audit report, the school's cash and cash equivalents is \$3,116,608 and total expenditures equal \$5,131,802. Therefore, the school's cash reserve level is 60.73%, which exceeds the recommended 5%.
9. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
10. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
11. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
12. 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, charter management organization employees, or school employee, who handle day-to-day finances and/or have responsibilities outlined within the charter school's financial policies and procedures, was provided.
13. An itemized accounting regarding total compensation paid in Fiscal Year 2020-2021 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.
14. Governing board meeting minutes reflecting the approval of the management fees, licensing fees, or other related party fees were provided.
15. The most current accounts payable aging report was provided.
16. Reviewed the following 16 checks and 4 electronic debit 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): 310059; 310101; 310126; 310181; 310220; 310301; 310327; 3210401; 310412; 310415; 310437; 310446; 310506; 310553; 1003859; and P007137.



- b. Deposits and transfer credit transactions (Pacific Western Bank Checking Account Ending in X6905): One deposit: 1) 1/31/2022 for \$175,490.79, and two debit transactions: 1) 1/31/2022 for \$100.00 and 2) 12/31/2022 for \$103,533.05. Debit transaction (California Credit Union Account Ending in X5561): 12/31/2022 for \$4,354.03
- 17. Reviewed credit card statements from July 2021 through December 2021. Selected the months of November 2021 and December 2021 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) – closed June 2021
 - 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) – closed September 2019
 - f. California Credit Union Credit Card Ending in X0269 (Coordinator of Operations, Bert Corona Charter High) - closed September 2019
 - 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)
 - i. California Credit Union Credit Card Ending in X0096 (Executive Director)
 - j. California Credit Union Credit Card Ending in X0047 (Executive Administrator, Monseñor Oscar Romero Charter)
 - k. California Credit Union Credit Card Ending in X0509 (Director of Operations, Bert Corona Charter)
 - l. California Credit Union Credit Card Ending in X0517 (Executive Administrator, Bert Corona Charter)
- 18. Reviewed bank statements and bank reconciliations from August 2021 through January 2022. Selected the months of December 2021 and January 2022 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)
- 19. A Segregation of Duties (SOD) review was conducted remotely at Bert Corona Charter High via videoconference. No discrepancies were noted.
- 20. Reviewed student body financial records from June 2021 to March 2022. No discrepancies were noted.
- 21. Equipment inventory was provided.
- 22. Education Protection Account (EPA) allocation and expenditures pertaining to the prior Fiscal Year (i.e., 2020-2021) are posted on the charter school’s website.
- 23. The most current Audited Financial Statements are not posted on the charter school’s website. Please see Other Observations section above.
- 24. The 2021-2022 Local Control and Accountability Plan were submitted to LAUSD.



25. The most current Local Control and Accountability Plan are posted on the charter school’s website.
26. Monseñor Oscar Romero Charter Middle has historically engaged in intraorganizational borrowing. YPICS’ 10/26/2020 governing board meeting minutes stated that Bert Corona Charter High was facing challenges in obtaining drawn down funds for GEAR UP grants due to the YPI closure. To assist Bert Corona Charter High with its cash flow needs, Bert Corona Charter High was approved to borrow up to \$600,000 from Monseñor Oscar Romero Charter Middle. Per the 2020-2021 independent audit report, Monseñor Oscar Romero Charter Middle had a \$111,000 intercompany receivable balance from Bert Corona Charter High as of June 30, 2021. According to the school, as of January 2022, the intraorganizational borrowing balance was \$0. Additionally, per the 2020-2021 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, 2021, the outstanding balance on this loan was \$7,527,088. 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. In addition, YPICS also has an open Line of Credit of \$500,000 with Pacific Western Bank, with a variable rate set at 4% annually (per the 2020-2021 audit report) and no outstanding balance as of January 2022.
27. Documentation pertaining to the U.S. Small Business Administration’s (SBA) Paycheck Protection Program (PPP) was provided.
28. Documentation pertaining to grants that the school received during both Fiscal Years 2020-2021 and/or 2021-2022 due to the COVID-19 pandemic was provided.
29. Pursuant to AB 1871, a signed and dated 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.
30. Monseñor Oscar Romero Charter Middle did not disclose any legal actions, regulatory proceedings, or investigations that might have a material fiscal impact (including financial viability) to the Charter School, and that is currently pending or was filed within the last year or since the last disclosure period, whichever is later.
31. The 2020-2021 audited and unaudited actuals nearly mirror each other. The school’s reported Norm Enrollment was 340, 342, 357, 318, and 295 students for Fiscal Years 2017-2018, 2018-2019, 2019-2020, 2020-2021, and 2021-2022 respectively, representing an accumulated decrease in enrollment of 45 students (13%) since Fiscal Year 2017-2018. The school’s reported Norm Enrollment for Fiscal Year 2021-2022 is 295 students, which represents a shortfall of 80 students (or approximately 21%) below its projected student enrollment for Fiscal Year 2021-2022 (i.e., 375 students) per its enrollment roll-out plan and its current approved enrollment capacity (i.e.,375 students) per the school’s operative charter. Per YPICS, its plans to increase enrollment include re-engaging main feeder schools and making presentations to parents and students; updating the school website to increase web presence; contracting with a vendor to expand online outreach; and installing banners on major roadways around the campus. As noted above, the school has had positive net assets and continues to project positive net assets for Fiscal Year 2021-2022 per its 2021-2022 Second Interim Financials. The CSD will continue to monitor the school’s student enrollment through oversight.

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 of 1-4]

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

<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].</i></p>	<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].</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, once prior to each charter renewal term; 6. Charter school consistently adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board reviews and approves 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 school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive ; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal 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 reviews and approves 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 school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p>	<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p>
<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted 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 by the required deadline(s). 	<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted 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, which may include the supplemental criteria below, and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p>
<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainty as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting. 	<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainty as defined in CCR, Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.



*An existing school that meets all of the Required Criteria and two of the supplemental criteria listed below would be assessed eligible to be considered as **Developing** [Rating of 2].*

*An existing school would be assessed as **Unsatisfactory** [Rating of 1] based on the statements below:*

Existing Schools (based on the most current audit):

An existing school is one that has at least one annual independent audit on file with the Charter Schools Division

Existing Schools (based on the most current audit):

An existing school is one that has at least one annual independent audit on file with the Charter Schools Division

REQUIRED CRITERIA

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, once prior to each charter renewal 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 school day (pursuant to AB 1871 [Ed. Code § 47613.5]);
7. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website;
8. The LCAP is submitted to the appropriate agencies;
9. Have an audit conducted annually by an independent auditing firm; and
10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:

A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for *Accomplished, Proficient, or 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. The charter school has shown no *feasible* financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school’s operation to mitigate the negative fiscal condition. The charter school’s governing board members and/or leadership lack fiscal capacity.

Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.

Note: Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.

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

SUPPLEMENTAL CRITERIA

1. The school maintains the minimum reserve for economic uncertainty as defined in CCR, Title 5, Section 15450



<p><i>An existing school that meets all of the Required Criteria and two of the supplemental criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p>(https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures);</p> <ol style="list-style-type: none"> 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting. 	

<p><i>A new school that meets all of the Required Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>A new school would be assessed as <u>Unsatisfactory</u> [Rating of 1] 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 significantly below the enrollment per the school’s <i>Pupil Estimates for New or Significantly Expanding Charters</i> report and/or its approved petition budget, 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 projections; 4. Projected debt, if any, 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 	<p><u>New Schools:</u></p> <p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Accomplished</i>, <i>Proficient</i>, or <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school’s operation to mitigate the negative fiscal condition. The charter school’s governing board members and/or leadership lack fiscal capacity.</p> <p>Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.</p>



A new school that meets all of the Required Criteria listed below would be assessed eligible to be considered as Developing [Rating of 2].

A new school would be assessed as Unsatisfactory [Rating of 1] based on the statements below:

6. As a practice, the governing board reviews and approves 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 school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]);
8. The most current governing board-approved LCAP is posted on the charter school's website; and
9. The LCAP is submitted to the appropriate agencies.

Note: A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.

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

Note: A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.

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