



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT* **2022-2023 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 continues to respond 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 CSD Administrator will provide any updated information reach out with more details, as needed.



Charter School Name: Monseñor Oscar Romero		Location Code: 8196	
Current Address: 2670 W. 11 th Street		City: Los Angeles	ZIP Code: 90006
Phone: 213-413-9600		Fax:	
Current Term of Charter¹: July 1, 2017 to June 30, 2024		LAUSD Board District: 5	LAUSD Region: West
Number of Students Currently Enrolled: 280	Enrollment Capacity Per Charter: 375	Number Above/Below Enrollment Capacity (day of visit): (95)	
Grades Currently Served: 6-8	Grades To Be Served Per Charter: 6-8	Percent Above/Below Enrollment Capacity (day of visit): -25.33%	
Norm Enrollment Number: 280			
Total Number of Staff Members: 36	Certificated: 18	Classified: 18	
Charter School's Leadership Team Members:	Freddy Zepeda, Interim-Executive Administrator; Yvette King-Berg, Executive Director; Jennifer Geissler, SFAF Coach; Lilia Limón, SFAF Director, Mary G. Keipp, Board Chair; Edwin Cruz, Coordinator of School and Climate		
Charter School's Contact for Special Education:	Vashon Nutt, Director of Special Education	SELPA & Option:	Option 3
CSD Assigned Administrator:	Dr. B. A. Monaster	CSD Fiscal Services Manager:	Cindy Delos Santos-Iya
Other School/CSD Team Members:	Christian Mendez, Coordinator CSD		
Oversight Visit Date(s):	April 13, 2023	Fiscal Review Date (if different):	Not Applicable
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
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)	Not Applicable	COO/TCO Approved Grade Levels and Occupancy Loads:	Not Applicable

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
4, Accomplished	2, Developing	3, Proficient	3, Proficient

¹ AB 130 added Section 47607.4 to the California Education Code (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.



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 2022-2023*. 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	4, Accomplished
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S) - The Governing Board has fully implemented the organizational structure set forth in approved charter, including evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school’s executive level leadership, as evidenced by:</p> <ul style="list-style-type: none"> • A system of evaluation for executive level leadership including positions reporting to the Governing Board, such as Chief Operations Officer and Executive Director. • Board agenda dated 4/25/2023, included School Committee/Council Reports. • Board agenda dated 6/13/2022, included LCAP Hearing: Local Control and Accountability Plan recommendations from parents, community members and staff. <p>G2: BROWN ACT - The Governing Board complies with all material provisions of the Brown Act, as evidenced by:</p> <ul style="list-style-type: none"> • A posted calendar of the 2022-2023 Board Meeting Dates. • On Track includes agendas, minutes, and attachment documents from the board meeting. • Board agenda dated 10/31/2022, included an action item on Teleconferencing Meetings During State of Emergency. • Board minutes dated 2/6/2023, reflected Brown Act Training. <p>G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - The Governing Board considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria), as evidenced by:</p> <ul style="list-style-type: none"> • Agendas, minutes, and meeting materials demonstrate how the Governing Board reviews and analyzes school data and stakeholder input to inform and support sound decision making, as follows: <ul style="list-style-type: none"> ○ Board minutes dated 10/31/2022 included: <ul style="list-style-type: none"> ▪ Approval of EL Plan for Monseñor Oscar Romero. ▪ Monseñor Oscar Romero - Benchmark Data from iReady Diagnostic ▪ YPICS Total Professional Development Days • Board minutes dated 12/5/2022 included: <ul style="list-style-type: none"> ○ Board’s retreat with a three year draft of a strategic plan. ○ Monseñor Oscar Romero – data chat regarding diagnostic tests, such as iReady. ○ Youth Truth survey responses revealed: <ul style="list-style-type: none"> ▪ Teachers feeling confident about teaching the curriculum ▪ Student and staff safety ranked higher than the prior year ▪ Students feel challenged by the learning. • Board minutes dated 2/6/2023 included: 	



Instructional update data chat on Middle School’s Mid-Year Growth Reports with 51% of students making progress towards typical growth.

- Board minutes dated 3/27/2023 included:
Monseñor Oscar Romero – data chat on academic focus with student typical growth goals.
- See *Notes* section below.

Areas Noted for Further Growth and/or Improvement

See *Notes* below.

Corrective Action Required

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

Notes:

The CSD observed a pattern of YPICS’s noncompliance with Education Code section 47604.3 as well as the Federal, State, and District Required Language (FSDRL), which expressly requires all charter schools to “promptly respond to all inquiries” from the District.

****NOTE: A charter school may receive a rating of 1 in this category for the following: (1) Evidence of conflict (s) of interest within the organization (i.e. Governing Board, staff, contracted external parties, etc.), (2) School is in breach of the operative charter, including Federal, State, and District Required Language, (3) School is “Not in Good Standing”, and/or (4) If there are serious concerns related to fiscal matters (e.g., negative financial condition, fiscal mismanagement, and/or significant audit findings, etc.).***



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 as set forth in the approved charter
- 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., School Site Council and English Learner Advisory Committee)
- Evaluation of school’s executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4 of the approved charter, such as Executive Director, Area Superintendent, Principal, etc.)

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school’s executive level leadership <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 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"/> Current organizational chart (B1.1a) <input checked="" type="checkbox"/> Organizational chart in Board approved charter (B1.1b) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Committee/council calendars, agendas, roster(s), 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 Ralph M. Brown Act (“Brown Act”) (Gov. Code, §§54950, et seq.)
- Governing Board holds its meetings at a location(s) and in a manner that complies with applicable Brown Act requirements and Ed. Code, §47604.1, including but not limited to teleconferencing, closed session, public comment, and Reasonable Accommodations.
- The public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as required by applicable Brown Act provisions, Ed. Code, § 47604.1(c)(1)(A) and as described in the approved charter.
- Governing Board meeting agendas contain adequate item descriptions and are posted on the school’s website and on campus in accordance with the requirements of the Brown Act.
- Governing Board meetings are held in accordance with the Brown Act including the requirements set forth in Ed. Code § 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 checked="" type="checkbox"/> School website <input type="checkbox"/> Observation of Governing Board meeting(s) <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 school policy, to honor and protect the rights of students, employees, parents, and the public in the following areas:

- Student discipline
- Employee grievances and discipline
- Stakeholder complaint resolution pursuant to the Uniform Complaint Procedures (UCP)
- Parent/stakeholder complaint resolution for complaints outside regulatory scope of UCP

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board has well-developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input checked="" type="checkbox"/> The Governing Board has 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"/> Human Resources (HR) policies and procedures (B1.13) <input type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4

<i>The Governing Board has systems in place to ensure ongoing:</i>	
<ul style="list-style-type: none"> • Review and use of academic performance data (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 Local Control and Accountability Plan (LCAP) and additional school plans, (e.g., Comprehensive Support and Improvement (CSI), Additional Targeted Support and Improvement (ATSI), School Plan for Student Achievement (SPSA), and action plans for making progress toward LCAP goals) • Transparent governance and accountability to stakeholders, including consideration of input from the school’s committees/councils and stakeholders • Monitoring of staffing needs and the school’s compliance with all applicable credentialing, clearance, and training requirements 	
Rubric	Sources of Evidence



Performance	<input type="checkbox"/> The Governing Board regularly considers school performance data, 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 data, 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 data, 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 data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.)	<input checked="" type="checkbox"/> Board meeting agendas, minutes, and meeting materials for meetings at which the Board reviewed: (B1.14a) <input checked="" type="checkbox"/> CA School Dashboard Academic Performance Indicators (ELA, MATH, ELPI, CCI) <input checked="" type="checkbox"/> CA School Dashboard Academic Engagement Indicators (Chronic Absenteeism, Graduation Rate) <input checked="" 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"/> Human Resources (HR) policies and procedures (B1.13) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14b) <input checked="" type="checkbox"/> Documentation of Board member and/or executive leadership training on topics that support responsive and accountable governance (e.g., data-driven decision making, Board roles and responsibilities, etc.) (B1.14c) <input type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)
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G5: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #5

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

- The school is fiscally strong and net assets are positive in the prior two independent audit reports.
- 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	<p><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)</p> <p><input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report*</p> <p><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*</p> <p><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> <p>*Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of 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.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level.</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>	<p><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)</p> <p><input checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)</p> <p><input checked="" type="checkbox"/> Observation of Governing Board meeting</p> <p><input checked="" type="checkbox"/> Discussion with leadership</p> <p><input checked="" type="checkbox"/> Independent audit report(s)</p> <p><input checked="" type="checkbox"/> Other financial information submitted by the school</p> <p><input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)</p>



G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE 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 checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input checked="" 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):

None



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	2, Developing
2020 California Department of Education’s (CDE) Charter School’s Performance Category	Middle Performing
<p>Does the charter school qualify for technical assistance? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>If yes, what is the school’s identification? (See additional information within “Notes” section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - The schoolwide Dashboard ELPI Status is “High” with 61.0% of English Learners making progress towards English proficiency, which is above the statewide percentage of 50.3%.</p> <p>A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR - The schoolwide Dashboard Suspension Rate Indicator Status is “Medium” with 2.3% of students suspended at least once, and below the statewide percentage of 3.1%.</p> <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - The schoolwide Dashboard ELA Indicator Status is “Low” with a DFS of -63.1 and below statewide DFS of -12.2. The school leadership provided the following steps to support students academically:</p> <ul style="list-style-type: none"> • Created support classes where students are grouped based on academic needs. Support classes provide time for teachers to review CAASPP and iReady data at the start of the school year, and to provide targeted academic support in small-group settings. The support classes include: <ul style="list-style-type: none"> ○ Enrollment of 20 students per group ○ Teachers use resources from the iReady program to target learning gaps in the classroom ○ Groups meet daily for 50 minutes. ○ In December 2022, the team was able to look at the data from the second diagnostic and move students around accordingly based on students’ greatest academic need. ○ Support classes include Math, English, History, and Science. • Advisory classes provide social-emotional and academic check-ins with students. The advisory has been structured to serve as a class that allows students to engage in goal setting, community circles, 1-on-1 check-ins, and journaling. English Language Learners and Special Education students use the advisory as an opportunity to connect with a teacher in a one-on-one setting. 	



A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - The schoolwide Dashboard Math Indicator Status is “Very Low” with a DFS of -115.8 and below statewide DFS of -51.7.

See *A1: Dashboard Schoolwide ELA Indicator* for strategies.

A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - The schoolwide Dashboard Chronic Absenteeism Indicator Status is “Very High,” with 20.1% of the school’s chronic absenteeism percentage, which is lower than the state at 30.0%. The school leadership has implemented systems to communicate and support students and families to address chronically absentee students, as follows:

- Reports determine students that are considered chronically absent.
- Meetings with the families are scheduled to discuss issues and concerns.
- Student with social emotional needs are connected with the school’s on-site counselor and also to outside counseling services if its deemed necessary.
- Home visits by the School Community Coordinator to have an in-depth conversation with families.
- Identify additional community resources to support parents that are struggling due to the pandemic.

A8: DASHBOARD STUDENT GROUP ELA - None of the school’s numerically significant student groups (English Learner “Very Low”/-105.1, Latino “Low”/-63.5, Socioeconomically Disadvantaged “Low”/-63.7, and Students with Disabilities “Very Low”/-117.1) have “Status/DFS” scores above the statewide DFS.

See *A1: Dashboard Schoolwide ELA Indicator* for strategies.

A9: DASHBOARD STUDENT GROUP MATH - None of the school’s numerically significant student groups (English Learner “Very Low”/-153.0, Latino “Very Low”/-115.8, Socioeconomically Disadvantaged “Very Low”/-117.8, and Students with Disabilities “Very Low”/-156.2) have “Status/DFS” scores above the statewide DFS.

See *A1: Dashboard Schoolwide ELA Indicator* for strategies.

Corrective Action Required

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

Notes:

Due to the COVID-19 pandemic, state law suspended the reporting of state measures on the 2021 California School Dashboard. The color-coded performance level or Change level will not be issued due to the suspension of state measures on the 2021 Dashboard and not having two consecutive years of reported data. Accordingly, indicators in the Student Achievement and Educational Performance category for the 2022-2023 Annual Performance-Based Oversight Report are scored based on 2022 Status level data except for the College/Career Indicator (CCI), as CAASPP testing was optional for the 2020-2021 school year. CCI will resume with “Status Only” reporting on the 2023 Dashboard.

A11: As of the time of the issuance of this Annual Performance-Based Oversight Visit Report, the state has not published the “Annual Reclassification (RFEP) Counts and Rates” for the 2021-2022 academic year. Considering this fact, the 2022- 2023 Annual Performance-Based Oversight Visit Report does not rate the



Student Achievement and Educational Performance indicator “A11: English Learner Reclassification.” Please note that, depending on the release date of the 2021-2022 RFEF counts and rates, the District may elect to update and reissue a revised 2022-2023 Annual Performance-Based Oversight Visit Report with indicator A11 rated and calculated into the final overall Student Achievement and Educational Performance category rating.

The school employs the following English Learner (EL) Reclassification Criteria:

Reclassification

The California State Board of Education's Reclassification Guidelines for English Learners

1. Comparison of performance in basic skills – earning C grades on core subject of English at grade level.
2. Assessment of English Proficiency- ELPAC Results, NWEA Maps
3. Teacher evaluation of student academic performance
4. Parent opinion and consultation

Grade Level	Performance in Basic Skills	Formative Assessment	Classroom Performance	Teacher Evaluation
6-8	<ul style="list-style-type: none"> • ELPAC Results (4 or 5 Score) • Smarter Balanced (Standard Met or Standard Exceeded) 	<ul style="list-style-type: none"> • SBAC Interim Assessments • NWEA • Achieve3000 • Other to be adopted 	<ul style="list-style-type: none"> • Grade in English Language Arts Course (C or better) 	<ul style="list-style-type: none"> • Teacher Observation Rubrics • Teacher Judgment that is students is sufficiently prepared to perform in core curriculum at a level equal to Native English speakers

Rate of “At Risk” ELs is Lower in comparison to the state average

Rate of “LTELs” is Higher in comparison to the state average

***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. (Not applicable for the 2022-2023 school year due to the absence of updated performance classification. Will resume with updated performance classification published by the state.)**

A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1



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

- California School Dashboard Schoolwide ELA data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is High; or Medium and at/above statewide Distance From Standard (“DFS”) <input checked="" type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the ELA Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" 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

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

- California School Dashboard Schoolwide Math data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is High; or Medium and at/above statewide DFS <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Medium and below statewide DFS; or Low <input checked="" type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Math Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" 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

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>		
<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 Status is Very High <input checked="" type="checkbox"/> The schoolwide Dashboard ELPI Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Medium and below statewide percentage; or Low <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the ELPI on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A4: DASHBOARD SCHOOLWIDE COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - QUALITY INDICATOR #4

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>		
<ul style="list-style-type: none"> California School Dashboard Schoolwide CCI data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input checked="" 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 Status is Very Low <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Low; or Medium and at/below statewide percentage <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Medium and above statewide percentage; or High <input checked="" type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Very High <input type="checkbox"/> Not Available - No Status 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 checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" 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 Status is Very Low <input checked="" type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Low; or Medium and at/below statewide percentage <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Medium and above statewide percentage; or High <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Very High <input type="checkbox"/> Not Available - No Status assigned for the Suspension Rate Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" 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 Status is Very High <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Medium and below statewide percentage; or Low <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Graduation Rate Indicator on the Dashboard <input checked="" type="checkbox"/> Not Applicable - The Graduation Rate 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"/> Parent-Student Handbook or other documentation of school’s graduation requirements (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD STUDENT GROUP 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 student groups (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 student groups have “Status/Distance From Standard (DFS)” scores above the statewide DFS <input type="checkbox"/> The majority of numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Less than a majority of the numerically significant student groups have “Status/DFS” scores above the statewide DFS <input checked="" type="checkbox"/> None of the school’s numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Not Available - No assessment of performance for this indicator	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A9: DASHBOARD STUDENT GROUP 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 student groups (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 student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> The majority of numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Less than a majority of the numerically significant student groups have “Status/DFS” scores above the statewide DFS <input checked="" type="checkbox"/> None of the school’s numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Not Available - No assessment of performance for this indicator	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A10: DASHBOARD STUDENT GROUP 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 student groups (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 checked="" type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



A11: ENGLISH LEARNER RECLASSIFICATION - QUALITY INDICATOR #11

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> English Learner reclassification rate for 2021-2022 (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school reclassified English Learners at a rate higher than the state average <input type="checkbox"/> The school reclassified English Learners at a rate similar to the state average <input type="checkbox"/> The school reclassified English Learners at a rate lower than the state average <input type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> Not Applicable - The school did not have any English Learners <input checked="" type="checkbox"/> No Reclassification data for the 2021-2022 school year published by the state at the time of the issuance of this report. Please see “Notes” section above.	<input type="checkbox"/> Reclassification report (CDE) <input type="checkbox"/> Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input type="checkbox"/> Master Plan for English Learners adopted by school’s Governing Board (B3.2i)



A12: INTERNAL ASSESSMENT – VERIFIED DATA IMPLEMENTATION – QUALITY INDICATOR #12

The information provided in this report on internal assessments is to determine the charter school’s verified data implementation, as applicable. As part of renewal (once and as applicable) for charter schools that are identified by the California Department of Education (CDE) as Middle or Low Performing, the LAUSD Board shall consider schoolwide performance and performance of all student groups on the California School Dashboard and shall also consider clear and convincing evidence, demonstrated by verified data, showing either a) the school achieved measurable increases in academic achievement, as defined by at least one year’s progress for each in school or b) strong postsecondary outcomes equal to similar peers.

The LAUSD Board shall only consider verified data adopted by the State Board of Education pursuant to Education Code section 47607.2(c) (Approved List). In addition, staff’s review of the charter school’s submitted materials will be based on the verified data sources and related information adopted by the State Board of Education (Ed. Code, § 47607.2(c)(3).) Charter schools submitting verified data for this purpose must adhere to the state-approved criteria.

The information below is based on charter school’s self-reported data and will not be scored.

Academic Progress Indicator(s) for the 2021-2022 School Year:

Academic Progress Indicator: iReady by Curriculum Associates Reading	Grade Levels: 6-8	Assessment Administration: Fall/Spring	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Academic Progress Indicator: iReady by Curriculum Associates (Math)	Grade Levels: 6-8	Assessment Administration: Fall/Spring	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Academic Progress Indicator: Choose an item.	Grade Levels: Click or tap here to enter text.	Assessment Administration: Choose an item.	95% Participation Met*: <input type="checkbox"/> Met <input type="checkbox"/> Not Met

*If the charter school did not meet the 95% participation, the charter school’s plan to address the participation is included in the Notes below.

1. The charter school disaggregated student performance data for the following student groups: Click or tap here to enter text.
 The charter school did not disaggregate student performance data by student groups.
2. The charter school affirmed that the assessments were administrated as intended, consistent with the test publishers’ administration and test security procedures.
3. The charter school Choose an item. the test publisher’s definition of one year’s progress, per publisher’s source document.

Notes:

None

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

Not Applicable



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"/> Supplement to the Annual Update to the 2021-2022 LCAP <input checked="" type="checkbox"/> 2022-2023 Plan Summary <input checked="" type="checkbox"/> Engaging Educational Partners <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"/> Action 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	Choose a rating
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O1: SCHOOL HEALTH AND SAFETY PLANS AND PROCEDURES - The school has a well-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, as evidenced by:</p> <ul style="list-style-type: none"> • School Safety Plan: <ul style="list-style-type: none"> ○ Emergency Procedures table with specific guidelines and procedures for fire, earthquake, response lockdown, and no response lockdown. ○ Drill Status Report form. ○ Parent Notification Letter of Emergency Response Training for Students. ○ Evacuation Announcements. ○ Map of the school delineating evacuation areas. ○ PowerPoint: <ul style="list-style-type: none"> ▪ Emergency Procedures and Drills (fire and earthquake – student presentation) ▪ Supervision team norms and agreements. • Student Immunization and Health Screening: <ul style="list-style-type: none"> ○ Notice of out of Compliance Immunization Letter to parents. ○ A form template for individualized school immunization records. ○ TDAP flier in preparation for 7th grade. ○ PRN Nursing Consultants Services provided which included 329 student that were screened for vision, scoliosis, and audio on 2/ 9 and 2/10, 2023. • YPI Charter Schools, Inc. Suicide Prevention Policy which was revised 12/7/2020. <p>O2: HEALTH AND SAFETY TRAINING AND PREPARATION - see Areas Noted for Further Growth and/or Improvement below, for <i>O2: Health and Safety Training and Preparation</i>. In addition, evidence included:</p> <ul style="list-style-type: none"> • Epi-Pen: <ul style="list-style-type: none"> ○ Pictures with expiration dates of March 2023 (with PRN Nursing Consultants certification that the March 2023 “Remains effective for one year after the expiration date”) and December 2023 (Junior EpiPen). ○ 15 staff members were Epi-Pen Trained per log from PRN Nursing Consultants on 3/20/2023. • Suicide Prevention Training: <ul style="list-style-type: none"> ○ Student self-injury reporting, assessment, and support procedures. ○ Suicide Risk Assessment Tool. <p>O5: SPECIAL EDUCATION - The school has a system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, as evidenced by:</p>	



- 300 report – one service in tier 4 and four in tier 6. The school provided an explanation for services not rendered that included: “Unfilled position. Will provide compensatory time to make up missed service.”
- 200 report - 13 overdue IEP’s. The school provided an explanation, which included parents not attending the scheduled meeting and a rescheduling date for all overdue IEPs.
- DVR conducted 10/30/2019 with a Corrective Action Plan due 12/14/2018.
- Professional Development included:
 - Summer for New Teachers (Special Education 101).
 - Using Intervention models to support students with high needs dated 8/7/2020.
 - YPICS Verbal Interventions to Alleviate Behavior Escalation dated 10/28/2021.
 - Accommodations vs. Modifications.
 - The ABCs of Behavior.
 - MTSS Overview.
 - Behavior de-escalation strategies.

O6: SCHOOL CLIMATE AND STUDENT DISCIPLINE - The school has a 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 by:

- Behavior Expectations Chart.
- Behavior Reflection form for students to complete.
- Bullying Prevention Month- Beverly Hills dated 10/9/2022.
- Self-Harm Presentation Assembly 2022-2023.
- Gang Reduction Youth Development PowerPoint and GRYD Referral Document.
- Access to Mental Health (Luminarias)
- Behavior contract.
- Scholar Athlete Contract.
- Positive Behavioral Interventions and Supports Power Point.
- Tier intervention supports behavioral and academic issues.
- Student Assembly Power Point 2022-2023.
- 2022-2023 ODR Report
- MORCS Tiered Fidelity Inventory dated 1/9/2023 with a score of 57%.
- School-wide PBIS Tiered Fidelity Inventory Walkthrough Tool dated 2/3/2023.
- Ripple Effects Data and Information.
- During the classroom observation it was noted an evident change in the school’s culture and climate as opposed to prior years. Students were engaged in classroom, there was qualitative evidence that the students at MORCS have a welcome, supportive, and inclusive environment.

Areas Noted for Further Growth and/or Improvement



O2: HEALTH AND SAFETY TRAINING AND PREPARATION - 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, as evidenced by :

- Emergency Drills Calendar- a total of five drills with three lockdown drills, one earthquake, and one evacuation. California law requires public and private schools to conduct a minimum number of emergency-drills every school year, the school did not conduct sufficient drills per CA Ed. Code 32001.
- A Drill/Emergency Status Report dated 12/12/2022.

O3: IMPLEMENTATION OF THE EDUCATIONAL PROGRAM - 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, as evidenced by:

- A list labeled Parent Engagement.
- Parent Portal.
- Study Hall flyer Tuesday and Wednesday for Math, Science, and English from 3:30-4:30 p.m.
- Weekly Extra Curricular Schedule (Volleyball, Anime, Art, Esports, Study Hall, Robotics, Bookmaking, Chess Club, and Tutoring).
- One PowerPoint titled Standards-Based Grading for Mastery- Planning and Practice Overview.
- The school’s leadership noted the following strategies:
 - Use of sentence starters for English Learners on bulletin.
 - Observed in one classroom an “exemplar” display.
 - Differentiation of instruction (student grouping with support).
 - Consistent use of word walls, graphic organizers, posted work with rubrics with meaningful feedback related to the academic work.
 - Calm learning environments and classrooms with interesting content for learning.
 - Board and individual whiteboards in use.

Areas for growth:

- Continue to develop student voices, collaborative, and engaged conversations.
- Continue to develop strategies to address missed opportunities for academic monitoring (ELD)
- Continue to develop the RACE strategy across all classrooms.
- Continue to develop strategies to ensure students are using each other as a resource.

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 2022-2023) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; and/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.*
- *A charter school may receive a rating of 1 in this category if the school is in breach of the operative charter, including Federal, State, and District Required Language related to this section.*



O1: SCHOOL HEALTH AND SAFETY PLANS AND PROCEDURES - QUALITY INDICATOR #1

The school has implemented school health and safety plans and procedures that ensure:

- A current site-specific Certificate(s) of Occupancy or equivalent that authorizes the current use of the site
- A current, comprehensive, site-specific comprehensive Health, Safety, and Emergency School Safety Plan per requirements of Ed. Code, §§ 47605(c)(5)(F), 32282(a)(2)(A)-(J), and 35179.4, as applicable.
(**Note:** For schools co-located with a District school, the charter school participates in and complies with the District school’s Integrated Safe School Plan)
- Posting of the school’s Visitor Policy in a visible location in or outside the school’s main office and in the Parent-Student Handbook
- Monitoring and documentation of compliance with student immunization requirements
- Completion and documentation of health screenings (e.g., vision, hearing, and scoliosis) per current applicable law and terms of the charter
- A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), requirements of Ed. Code § 215
- Provision of at least one nutritionally adequate free or reduced priced meal each school day for all needy students, per Ed. Code § 47613.5
- For schools serving grades 7-12, inclusion of the phone number for the National Suicide Prevention Lifeline on at least one side of Student ID cards, as outlined in Ed. Code § 215.5

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a well-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 type="checkbox"/> The school has a 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input checked="" type="checkbox"/> Certificate(s) of Occupancy or equivalent (B3.1b) <input checked="" type="checkbox"/> Student immunization (B3.1h) <input checked="" type="checkbox"/> Health screening (B3.1h) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1c) <input checked="" type="checkbox"/> Evacuation route maps (B3.1c) <input checked="" type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.1k) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1f) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Site/classroom observation <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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, per Ed. Code § 49414
- 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 § 35179.6
- Staff receive annual training in Pupil Suicide Prevention and Awareness (as applicable) pursuant to Ed. Code §215.
- Staff receive training in bloodborne pathogens, per 8 California Code of Regulations (“CCR”), § 5193

	Rubric	Sources of Evidence
Performance	<input 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 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 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 (B3.1g) <input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1c) <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 and B3A.5) <input checked="" type="checkbox"/> Epi-pen and training (B3.1i) <input type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.1j) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023 (“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 and analyzing school and student progress towards annual goals (schoolwide and for all student groups that the school serves) that are consistent with the educational performance measured by the California School Dashboard and state assessments
- 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. This includes full implementation of all key features, regularly reviewing and analyzing school and student progress towards annual goals and/or monitoring student progress toward completion of graduation and A-G requirements and providing ongoing professional development specific to student outcomes and key features as outlined in the charter. <input type="checkbox"/> The school has 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 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 (B3.2i, B3.2j, B3.2k) <input checked="" type="checkbox"/> Standards-based instructional program (evidence of grade level and/or content lesson plans, unit plans) (B3.2a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.2c) (new schools only) <input type="checkbox"/> WASC accreditation (B3.2d) <input type="checkbox"/> UC Doorways course approval documentation (B3.2e) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <input checked="" type="checkbox"/> Evidence of system for monitoring student progress toward and completion of graduation and A-G requirements (B3.2g) <input type="checkbox"/> Mathematics Placement Assessment (school serving 9 th graders) (B3.2m) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O4: MEETING THE NEEDS OF ALL STUDENTS; STUDENT GROUP DATA ANALYSIS - QUALITY INDICATOR #4

The school has a system in place to ensure:

- Implementation of differentiated instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all numerically significant student groups 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)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and generally modifies instruction based on data analysis <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 student groups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and does not consistently modify instruction based on data analysis	<input checked="" type="checkbox"/> Standards-based instructional program (evidence of grade level and/or content lesson plans, unit plans) (B3.2a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <input checked="" type="checkbox"/> Documentation of intervention and support for all students (B3.2j) <input checked="" type="checkbox"/> Master Plan for English Learners (B3.2i) <input checked="" type="checkbox"/> Documentation of implementation of the school’s Master Plan for English Learners (B3.2j) <input checked="" type="checkbox"/> Implementation of a data analysis system (B3.2k) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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 well-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 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 type="checkbox"/> Charter school does not participate in LAUSD's SELPA	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> District Validation Review (DVR) (B3.3a) <input checked="" type="checkbox"/> Self-Review Checklist (B3.3a) <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.3a) <input checked="" type="checkbox"/> Professional development documentation (B3.3a and B3.3c) <input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.2j) <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Other special education documentation (B3.3a) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <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 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 groups
- Minimize chronic absenteeism for all students and student groups
- 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 well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input checked="" type="checkbox"/> The school has a 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 (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <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 (B3.3b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention (e.g. SSPT) (B3.3b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.3b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.3b) <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.3b) <input checked="" type="checkbox"/> Data monitoring (B3.3b) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <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 		
	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a well-developed 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 (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development year-long plan agendas, and sign-ins) (B3.3c) <input checked="" type="checkbox"/> Professional development training materials (B3.3c) <input checked="" type="checkbox"/> System to assess professional development needs (B3.3c) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Stakeholder focus group <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
- The liaison for students experiencing homelessness has identified this population through outreach and coordination activities with other organizations, and provided related referral of services to families, children, and youth experiencing homelessness.

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> The school has a 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 (B3.2b) <input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.3d) <input checked="" type="checkbox"/> Stakeholder consultation (B3.3d) <input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.3d) <input checked="" type="checkbox"/> Foster youth/students experiencing homelessness liaison (B3.3d) <input checked="" type="checkbox"/> School website (B3.3e) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



O9: TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

<p><i>The school has a system in place to ensure that it operates in a transparent manner and keeps stakeholders informed, including:</i></p> <ul style="list-style-type: none"> • Information is easily accessible to the public and school stakeholders, including but not limited to applicable categories described in Charter School Transparency Resolution • UCP and all complaint procedures • Title IX information is available in applicable languages as required by law • Per Ed. Code § 234.6 and District policy, specified information relating to suicide, bullying, discrimination and harassment prevention, among other things, are readily accessible in a prominent location on the school website in a manner that is easily accessible to parents/guardians and students • Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance • 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 • 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, in accordance with Ed. Code, § 47605 (high schools only) 	
Rubric	Sources of Evidence



Performance

- The school has a well-developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website
- The school has a system to share information with stakeholders via its documents available both manually, electronically and on its website
- The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website
- 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

- UCP Procedure and Forms (B1.11)
- Complaint Procedure and Forms (B1.12)
- Review of the following information posted to the school’s website (B3.3e):
 - LCAP, per Ed. Code § 47606.5(h)
 - Current Board agenda in compliance with Brown Act, per Gov. Code, §54954.2(a)(1)
- Website posting required per Ed. Code § 234.6 (B3.3e):
 - Policy on Pupil Suicide Prevention
 - Title IX information, including a link to CDE’s Title IX website
 - Policies on anti-discrimination, anti-harassment, anti-intimidation, anti-bullying, and sexual harassment policies, including:
 - Anti-cyberbullying procedures
 - Social media anti-bullying procedures
 - Link to statewide resources including community based organizations compiled by CDE
- Sharing accessible and relevant information about individual student, student group, and schoolwide academic progress and performance with all stakeholders as appropriate (B3.3e)
- Access to approved charter (B3.3e)
- Compliance with the LAUSD BOE’s Charter School Transparency Resolution, including (B3.3e):
 - Financial Audit
 - Student Demographics
- Documentation of informing parents/guardians about transferability of courses/course credit and eligibility to meet A-G requirements (high schools only) (B3.3e)
- Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.3e)
- Notification of access to available mental health services (B3.3e)
- School website (B3.3e)



	<input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

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:

- Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff
- Evaluation tool(s) for all school-based staff, including but not limited to administrators, certificated staff, and classified staff

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

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

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- Individuals who have been continuously employed in a teaching position since 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 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 all 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 2022-2023</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Human Resources (HR) policies and procedures regarding clearances and ESSA qualifications and credentialing requirements (B1.13) <input checked="" type="checkbox"/> Staff roster (B3A.1b) <input checked="" type="checkbox"/> School master schedule (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 clearances and credentialing certifications (B3A.6) <input checked="" 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):

None



8196	2019-2020					2020-2021					2021-2022				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Monseñor Oscar Romero Charter Middle															
Cash and Cash Equivalents		2,463,044	2,403,782	2,889,742	2,889,828		1,442,763	1,471,791	3,117,069	3,116,608		3,396,741	3,301,528	4,446,002	4,446,001
Current Assets		3,050,966	3,036,562	3,605,738	3,605,823		3,293,151	3,291,693	4,387,659	4,347,764		3,991,193	4,047,784	5,221,307	5,358,157
Fixed and Other Assets		28,318,362	28,316,644	28,243,018	28,243,018		27,430,967	27,473,415	27,474,708	27,474,708		26,669,528	26,669,001	26,668,250	26,668,249
Total Assets		31,369,328	31,353,206	31,848,756	31,848,841		30,724,118	30,765,108	31,862,367	31,822,472		30,660,721	30,716,785	31,889,557	32,026,406
Deferred Outflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		986,426	919,670	1,301,700	1,465,918		925,284	941,197	1,832,597	1,877,666		1,175,004	1,282,274	2,694,414	2,742,187
Other Long Term Liabilities		7,672,652	7,672,652	7,691,150	7,527,017		7,495,024	7,495,023	7,361,973	7,321,254		7,165,847	7,165,846	7,138,722	7,115,270
Unfunded OPEB Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		8,659,077	8,592,322	8,992,850	8,992,935		8,420,308	8,436,220	9,194,570	9,198,920		8,340,851	8,448,120	9,833,136	9,857,457
Deferred Inflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		22,710,251	22,760,884	22,855,906	22,855,906		22,303,810	22,328,888	22,667,797	22,623,552		22,319,870	22,268,665	22,056,421	22,168,949
Total Revenues	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	4,613,811	5,234,964	5,467,836	5,262,873	5,399,725
Total Expenditures	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	5,395,994	5,578,167	5,822,723	5,830,004	5,854,328
Net Income / (Loss)	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)	(709,734)	(552,096)	(527,018)	(188,109)	(232,354)	(782,183)	(343,203)	(354,887)	(567,131)	(454,603)
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	(643,826)	(572,453)	(521,733)	(426,711)	(426,711)	(709,734)	(552,096)	(527,018)	(188,109)	(232,354)	(782,183)	(343,203)	(354,887)	(567,131)	(454,603)
Net Assets, Beginning	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	22,328,888	22,667,797	22,667,797	22,667,797	22,623,552
Adj. for restatement / Prior Yr Adj	(498,852)	0	(87)	(87)	0	0	0	0	0	0	34,356	(4,245)	(44,245)	(44,245)	0
Net Assets, Beginning, Adjusted	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	22,363,244	22,663,073	22,623,552	22,623,552	22,623,552
Net Assets, End	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	21,581,061	22,319,870	22,268,665	22,056,421	22,168,949
Unrestricted Net Assets	1,937,815	1,937,815	1,990,167	2,341,739	2,341,739	2,445,760	2,428,390	2,428,390	2,667,797	2,623,552	2,240,777	2,240,777	2,213,790	2,194,469	2,205,897
Restricted Net Assets	20,772,436	20,772,436	20,770,717	20,514,167	20,514,167	0	19,858,050	19,900,498	0	0	0	79,093	54,875	109,952	109,952

8196	Audited Financials					2022-2023				
	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Monseñor Oscar Romero Charter Middle										
Cash and Cash Equivalents	2,788,433	2,889,828	3,116,608	4,446,001	0		2,892,508	3,001,526	0	0
Current Assets	3,350,158	3,605,823	4,347,764	5,358,157	0		4,050,648	4,351,226	0	0
Fixed and Other Assets	28,913,251	28,243,018	27,474,708	26,668,249	0		25,868,024	25,867,573	0	0
Total Assets	32,263,409	31,848,841	31,822,472	32,026,406	0		29,918,673	30,218,799	0	0
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0
Current Liabilities	1,159,164	1,465,918	1,877,666	2,742,187	0		1,168,275	1,307,290	0	0
Other Long Term Liabilities	7,821,628	7,527,017	7,321,254	7,115,270	0		6,954,656	6,954,656	0	0
Unfunded OPEB Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	8,980,792	8,992,935	9,198,920	9,857,457	0		8,122,931	8,261,946	0	0
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0
Net Assets	23,282,617	22,855,906	22,623,552	22,168,949	0		21,795,742	21,956,853	0	0
Total Revenues	11,223,654	4,702,563	4,899,448	5,399,725	0	6,003,783	6,455,197	6,674,752	0	0
Total Expenditures	5,291,723	5,129,274	5,131,802	5,854,328	0	6,742,108	6,828,321	6,886,848	0	0
Net Income / (Loss)	5,931,931	(426,711)	(232,354)	(454,603)	0	(738,325)	(373,124)	(212,096)	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	5,931,931	(426,711)	(232,354)	(454,603)	0	(738,325)	(373,124)	(212,096)	0	0
Net Assets, Beginning	17,350,686	23,282,617	22,855,906	22,623,552	0	22,268,665	22,056,421	22,056,421	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	487,815	112,444	112,528	0	0
Net Assets, Beginning, Adjusted	17,350,686	23,282,617	22,855,906	22,623,552	0	22,756,480	22,168,866	22,168,949	0	0
Net Assets, End	23,282,617	22,855,906	22,623,552	22,168,949	0	22,018,155	21,795,742	21,956,853	0	0
Unrestricted Net Assets	23,282,617	22,855,906	22,623,552	22,058,997	0		2,981,893	21,914,694	0	0
Restricted Net Assets	0	0	0	109,952	0		18,813,849	42,159	0	0



FISCAL OPERATIONS

You have been assessed by the Fiscal Oversight team and you are receiving the rating of **3, Proficient**

Other circumstances and information could influence the rating and are noted in this evaluation.

Monseñor Oscar Romero Charter Middle’s fiscal condition has been positive since the 2018-2019 fiscal year. According to the 2021-2022 independent audit report, the school had positive net assets of \$22,168,949 and a net loss of **(\$454,603)**. The 2022-2023 Second Interim projected positive net assets of \$21,956,853 and a net loss of **(\$212,096)**.

According to YPI Charter Schools, Inc.’s (YPICS) independent audit report dated June 30, 2022, Monseñor Oscar Romero Charter Middle is one of the three schools operated by YPICS, all of which are currently authorized by the Los Angeles Unified School District (LAUSD). YPICS and its charter schools reported positive net assets of \$26,009,324 and a net income of \$97,382. YPICS, without its charter schools, reported net assets of \$0 and net income of \$16,373. According to YPICS, there are no management fees charged to either Monseñor Oscar Romero Charter Middle or to the other charter schools that it operates. Instead, each school pays a portion of the actual expenses for administrative support, 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).

Financial Highlights

	FINANCIAL HIGHLIGHTS				
	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Audited Actuals)	2022-2023 (Second Interim)
Monseñor Oscar Romero Charter Middle					
Net Assets	\$23,282,617	\$22,855,906	\$22,623,552	\$22,168,949	\$21,956,853
Net Income / (Loss)	\$5,931,931	(\$426,711)¹	(\$232,354)¹	(\$454,603)¹	(\$212,096)²
Transfers In / Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
Cash and Cash Equivalents	\$2,788,433	\$2,889,828	\$3,116,608	\$4,446,001	\$3,001,526
Unrestricted Net Assets	\$23,282,617	\$22,855,906	\$22,623,552	\$22,058,997	\$21,914,694
Norm Enrollment Reported by the School	342	357	318	295	280



	FINANCIAL RATIO ANALYSIS				
Cash Reserve Level (Cash Balance/Total Expenditures) <i>5% and greater is recommended</i>	52.69%	56.34%	60.73%	75.94%	43.58%
Fund Reserve (Reserve for Economic Uncertainty) (Unrestricted Net Assets /Total Expenditures) <i>3% - 5% and greater is recommended (depending on the school's ADA)</i>	439.98%	445.60%	440.85%	376.80%	318.21%
Current Ratio (Working Capital Ratio) (Current Assets/Current Liabilities) <i>At least 1.2 or 120% is recommended</i>	289.02%	245.98%	231.55%	195.40%	332.84%
Debt Ratio (Total Liabilities/Total Assets) <i>Lower than 1.0 or 100% is recommended</i>	27.84%	28.24%	28.91%	30.78%	27.34%

¹The operating losses reported for Fiscal Years 2019-2020, 2020-2021 and 2020-2022 were primarily due to \$819,474, \$819,732, and \$820,844 depreciation expenses (non-cash in nature) for the respective years, recognized in the school's Proposition 1D property. When excluding these depreciation expenses, the school would have resulted in net operating income for the corresponding years.

²The projected net loss for Fiscal Year 2022-2023 is primarily due to depreciation expenses, similar to the explanation provided above.

Areas of Demonstrated Strength and/or Progress:

The school's fiscal condition is positive. Please refer to the Financial Highlights table 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 May 2022 through October 2022, the CSD noted five (5) checks that, as of October 31, 2022, had been outstanding for 60 days or more. Details regarding these checks are provided below. This is a recurring issue cited at least in the school’s 2020-2021 and 2021-2022 Annual Performance-Based Oversight Reports.

Item #	Acct. # Ending in	Check #	Check Issuance Date	Payee	Check Amount	Number of Days Check Outstanding (As of 10/31/2022)	Transaction Description
1	X6905	310732	6/07/2022	School Employee	\$136.41	146	Lowe’s-plant supplies for class
2	X6905	310754	6/28/2022	School Employee	\$134.54	125	Reimbursement for TB test and Livescan for intern
3	X6905	310779	7/15/2022	School Employee	\$303.21	108	Amazon Prime-various movies rental for film class
4	x6905	310817	8/19/2022	Home Depot	\$673.38	73	Awesome, Febreze Air Freshener, Sniffer wet jet refill
5	x6905	310830	8/31/2022	School Employee	\$103.50	61	09/06 - 09/08 Meal per diem for Casa Instructor Training
Total:					\$1,351.04		

Page 13 under of YPICS’s Fiscal Policies and Procedures (Approved 10/31/2022) 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. The new payment will have a new Reference ID for tracking purposes, however, the new Reference ID will not be updated in ExED’s accounting system where the original Reference ID is recorded as the new transaction is only impacting Nvoicepay’s account.”

When the CSD inquired to YPICS regarding the first two checks (Items 1 and 2) in the table above, YPICS responded that such policy does not apply as the outstanding checks have not been processed via Nvoicepay. It also added that, “These (two) checks were issued by ExED directly and are reimbursement checks for the school employees. When the checks were stale for 90 days, ExED team contacted the school and asked school staff to contact employees to confirm the checks were lost and needed to be re-issued. To avoid bank charges for stop payments, the school opts out to get confirmation from the employees that the checks are lost before re-issuing replacement checks. Sometimes that process takes a little bit of time. But as soon as verification is received, the checks are re-issued. Therefore, both outstanding checks have been voided and re-issued to the employees.” The CSD did not receive a response regarding the three remaining checks noted above.



The CSD recommends that the charter operator revise its fiscal policies and procedures to include specific handling practices for outstanding/stale checks that were not issued via NVoicepay, and provide continuing guidance and establish expectations for its staff regarding the research, investigation, write-off, and reissuance of all checks that have been outstanding for specified periods of time. The CSD further recommends that the charter operator and its back office provider adhere to its fiscal policies and procedures, including any revisions made thereafter.

2. Consistent Delays in Responding to CSD Inquiries/Document Requests:

The CSD observed a pattern of YPICS’s noncompliance with Education Code section 47604.3 as well as the Federal, State, and District Required Language (FSDRL), which expressly requires all charter schools to “promptly respond to all inquiries” from the District. The CSD observed YPICS’s consistently delaying responses and submissions of documentation and/or information requested by the CSD, which in turn, negatively impacts the CSD’s ability to conduct appropriate fiscal oversight. A partial listing of this history is summarized below (relating to CSD’s request for Fiscal Preparation Guide items, including Item # 23 - Student Body Financial Records, and related documents, for which the CSD’s communications spanned from October 2022 through April 2023).

Date	Email or Phone Correspondence (sent by the CSD staff)	Email Recipients	Email Copied to	CSD's Comments
10/17/22	Emailed 2022-2023 Oversight Fiscal Preparation Guide (FPG) document request, with a deadline of 11/09/2022	YPICS ED (Executive Director)	ExED SVP (Senior Vice-President)	On 11/16/2022, Executive Director requested additional time. New deadline of 12/02/2022 given by the CSD. ExED SVP provided documents for 11 of 29 requested items on 11/30/2022.
12/07/22	Follow-up email sent on the missing FPG documents.	YPICS ED, ExED SVP		The CSD sent a reminder for documentation not provided, originally due on 11/30/22.
01/17/23	Follow-up email sent on the missing FPG documents.	YPICS ED, ExED SVP		On 1/17/2023, ExED SVP, provided other documents requested but that item #23 (Student Body Financial Records) will be provided later.
01/20/23	Follow-up email sent on the missing FPG documents.	YPICS ED, ExED SVP		CSD gave extension deadline of 1/26/2023.
01/27/23	Follow-up email sent on the missing FPG documents.	YPICS ED	ExED SVP	CSD gave extension deadline of 1/26/2023.
02/06/23	Follow-up email sent on the missing FPG documents.	YPICS ED	ExED SVP	
02/14/23	Reminder sent on this item (included on sample documents request email), due by 2/17/23.	YPICS ED, ExED SVP		



03/02/23	Sent follow-up email regarding missing Fiscal Preparation Guide documents and other related items.	YPICS ED, ExED SVP		The CSD mentioned to the YPICS ED and ExED SVP that further delays may affect the fiscal operations rating. Later on 3/02/2023, ExED SVP sent to the CSD the prior year 2021-2022 Student Body Financial Records (ledgers).
03/03/23	CSD informed YPICS that such records are from prior year 2021-2022 and reiterated the request for the updated 2022-2023 records.	YPICS ED	ExED SVP, YPICS COO (Chief Operating Officer)	
03/07/23	CSD followed up regarding the updated Student Body Financial Records and other related items.	YPICS ED	ExED SVP	
03/13/23	CSD followed up regarding the updated Student Body Financial Records and other related items.	YPICS ED	ExED SVP	Follow-up email (along with other requests/inquiries) included reminder on non-receipt of missing student body records that may be noted in the oversight report.
03/23/23	CSD followed up regarding the updated Student Body Financial Records and other related items.	YPICS ED	ExED SVP	
04/13/23	CSD followed up with ExED VP during oversight visit and via e-mail regarding the updated Student Body Financial Records and other related items.	ExED SVP	YPICS ED, YPICS COO	On 4/20/23, the ExED SVP provided the requested updated Student Body Financial Records to the CSD.

The CSD recommends that the school’s leadership team and ExED, its back office services provider, endeavor to improve timeliness in responding to the CSD’s requests. Failure to timely respond to the CSD’s requests and/or inquiries constitutes a violation of the terms of the charter with LAUSD, as well as the applicable provisions under Ed. Code § 47604.3, which may affect the school’s ratings in its oversight reports (as indicated in the Fiscal Operations Rubrics) and will be considered in the charter renewal assessment of the school.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. The CSD recommends that the Annual Performance-Based Oversight Visit Report, including the above-noted fiscal findings and observations, be discussed at YPICS’ next governing board meeting, highly preferably no later than 90 days following the school’s receipt of this report, so that the charter school and its governing board may address any issues early enough to implement changes in order to see results in its next fiscal year. 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 have been addressed in the charter school’s Fiscal Policies and Procedures, are recommended for improvement to align with optimal business practices).

1. Late Submission of 2021-2022 Independent Audit Report:

State of California Education Code § 47605(m) requires each charter school to transmit a copy of its annual independent financial audit report for the preceding year by December 15 of each year. Consistent with guidance provided by the Los Angeles County Office of Education (LACOE), LAUSD granted an extension based on YPICS’ request through February 15, 2023, and its extraordinary reasons provided to the CSD. YPICS cited challenging situations for the delay, which included staffing shortages at the audit firm and additional federal and state compliance requirements. This extension does not waive the legal deadline specifically set forth in applicable state law, but rather permits the filing of the report after the deadline. YPICS’ annual independent audit report was received on February 6, 2023.

The Charter Schools Division will review the issue above by 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:****I. Review of Fiscal Documentation**

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2022, and noted the following:
 - a. Audit opinion: Unmodified/Unqualified.
 - b. Material weaknesses: None Reported.
 - c. Deficiencies/Findings: None Reported.
 - d. Lack of a Going Concern: None Reported.
2. The 2021-2022 audited and unaudited actuals nearly mirror each other.
3. The school's reported Norm Enrollment was 342, 357, 318, 295, and 280 students for Fiscal Years 2018-2019, 2019-2020, 2020-2021, 2021-2022, and 2022-2023 respectively, representing an accumulated decrease in enrollment of 62 students (18.1%) since Fiscal Year 2018-2019. The school's reported Norm Enrollment for Fiscal Year 2022-2023 is 280 students, which is 95 students (or approximately 25.3%) below its projected student enrollment for Fiscal Year 2022-2023 (i.e., 375 students) per the school's petition enrollment roll-out plan in its current charter. As noted above, the school has maintained a positive net asset balance for Fiscal Year 2021-2022 and projects a positive net asset balance for Fiscal Year 2022-2023, per its 2022-2023 Second Interim Financials. According to YPICS, several factors such as declines in birth rates, pandemic effects, job losses, labor shortages, unaffordable housing, and reverse migration patterns are negatively impacting its schools' enrollment. Additionally, YPICS mentioned that it plans to improve enrollment by building relationships with local schools by inviting them to its health fairs, school events, and book fairs; improving its social media presence by revamping its web sites and partnering with recent college graduates and vendors such as Schola and Niche to help support its enrollment campaigns; and continuous work on improving its academic programs and community involvement. The CSD will continue to monitor the school's student enrollment through oversight.
4. A Segregation of Duties (SOD) review was conducted on-site at Monseñor Oscar Romero Charter Middle. No discrepancies were noted.
5. Reviewed 33 checks and 6 electronic debit/credit transactions. No discrepancies were noted.
6. Reviewed bank statements and bank reconciliations from May 2022 through October 2022. Selected the month of October 2022 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
7. Reviewed 16 credit card statements from May 2022 through October 2022. Selected the months of August 2022, September 2022, and October 2022 for sample testing. No discrepancies were noted.

II. Review of 2022-2023 Fiscal Preparation Guide

1. Most current fiscal reports presented to the charter school's governing board: a) Balance Sheet; b) Income Statement (Statement of Activities), and c) Cash Flow Statement were provided.
2. Minutes of the meeting when the above fiscal reports (i.e., Items 1a., 1b., and 1c.) were presented to and approved by the charter school's governing board were provided.
3. Audit/fiscal reports issued by any public agency or third-party organizations, and the school's governing board minutes of all meetings reflecting the discussion of any of the fiscal reports and applicable audit findings resolution/corrective action were not provided as the charter school has indicated not applicable.
4. Minutes of the meeting when the 2022-2023 budget was adopted were provided.
5. Evidence of the charter school is offering STRS, PERS, Social Security, and/or any other benefits to its employees, and that this is done in a manner that is consistent with the charter terms and the Charter Schools Act (Education Code 47611) was provided.
6. Minutes of the meeting reflecting the selection of the independent auditor were provided.



7. Minutes of the meeting reflecting the discussion of the most current independent audit report were provided.
8. Minutes of the meeting reflecting the receipt, review, and discussion of the most current four interim financial reports (i.e., preliminary budget, first interim and second interim financial reports, and unaudited actuals) submitted to LAUSD were provided.
9. Minutes of the meeting reflecting the discussion and resolution of complaints received from staff or vendors were not provided as the charter school has indicated not applicable.
10. Minutes of the meeting reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report (this does not apply to charter schools that were not in operation for the 2021-2022 school year) were provided.
11. A copy of the most current fiscal policies and procedures was provided.
12. Minutes of the meeting reflecting approval of the current fiscal policies and procedures and, if applicable, minutes of the meeting reflecting the approval of the current procurement policies and procedures were provided.
13. A copy of the charter school's organizational chart that depicts the current reporting structure of the charter school, including but not limited to, any board members, charter management organization (CMO) employees (when applicable), and/or school employees, who handle day-to-day finances and/or have responsibilities outlined within the charter school's fiscal policies and procedures was provided.
14. An itemized accounting regarding the total compensation paid in Fiscal Year 2021-2022 to all executives, school leaders, administrators, directors, and non-certificated staff, who may have decision-making authority over the charter school, either employed directly by the charter school or the entity managing the charter school was provided.
15. A description of the relationship (legal, business or otherwise) the charter school maintains with any related party as defined in the CSD's 2022-2023 Fiscal Preparation Guide Item 14 was not provided as the charter school has indicated not applicable.
16. Copies of any and all of the most current signed and executed agreements/contracts within the last year (i.e., 2021-2022) or since the last update, whichever is later (including attachments and exhibits that accompany the agreements/contracts) with the administrative services provider and/or the back office services provider, or the charter school's operator and/or charter school's home office (e.g., management contracts, service agreements, license agreements, affiliation agreements, etc.) were provided.
17. Minutes of the meeting reflecting approval of the management fees, licensing fees, or any other fees were provided.
18. A copy of the sole statutory member's by-laws, and a copy of the sole statutory member's articles of incorporation were not provided as the charter school has indicated not applicable.
19. The most current accounts payable aging report, listing the balances owed, vendor names, invoice numbers, invoice dates, number of days outstanding, and, if applicable, explanations for 90+ days outstanding invoice(s) or in accordance with the charter school's fiscal policies and procedures was provided.
20. Check registers, or a list of all check/cash disbursements (when the school's payments are outsourced to a third-party provider), documenting all checks and electronic debit transactions for the prior 12 months (spanning from November 2021 to November 2022) were provided. No discrepancies were noted.
21. a) A list of all active credit card account(s), b) (If applicable) A list of all closed credit card account(s) within the last year, and c) All credit card statements for the most current six months (spanning May 2022 to October 2022) were provided. No discrepancies were noted.
22. a) A list of all active school bank account(s), b) (If applicable) A list of all closed school bank account(s) within the last year, c) Monthly bank statements and reconciliation reports for the most current six months (spanning from May 2022 to October 2022), and d) (If applicable) A list of all debit cards were provided. The CSD's observations were noted under the Areas Noted for Further Growth and/or Improvement above.
23. Student body financial records (including ASB policies and procedures, budgets, cash flow statements and projections, bank statements with reconciliations, audit reports, and other fiscal reports, if applicable) were provided. No discrepancies were noted.
24. The most current inventory listing for both capitalized and non-capitalized equipment, in Microsoft Excel format, including equipment description/type, brand/model, tag number, acquisition date, purchasing price, book value, asset life, and location of use was provided.



- 25. A link to the charter school’s website where the Education Protection Account (EPA) revenue and expenditures report pertaining to the prior fiscal year (i.e., 2021-2022) is posted (as required by Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution) was provided.
- 26. Links to the charter school’s website where the current (1) Audited Financial Statements, and (2) Local Control and Accountability Plan (LCAP) are posted (or the school’s assertion that its Audited Financial Statements are made available to members of the public) in accordance with Education Code section 47606.5(h) and/or LAUSD’s Charter School Transparency Resolution were provided.
- 27. Documents pertaining to the charter operator’s/school’s financing or borrowing activities were provided. Per the 2021-2022 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. Per YPICS, as of April 2023, the outstanding balance on this loan is \$7,115,269. 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 has an open Line of Credit of \$500,000 with Pacific Western Bank, at a variable rate set at 4% annually and with no outstanding balance as of April 2023.
- 28. The charter school’s plan(s) for the purchase/new lease, relocation/expansion to new school site(s), facilities-related expansions, and/or major improvements to the existing and/or new school site(s) and pertinent documents with the following information, as appropriate were not provided as the charter school has indicated not applicable.
- 29. Disclosure of legal issues was not provided as the charter school has indicated not applicable.

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 was/is in operation/active in the preceding school year(s) and the current school year. Existing schools may receive a rating of 1, 2, 3, or 4.

New School – a charter school that is in its first year of operation in the current school year and does not have an independent audit report for its first operative year on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools may receive a rating of 1 or 2.

<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four 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, at a minimum, meets all of the Required Criteria and at least three 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></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 annual independent audits show no material weaknesses, deficiencies, and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., California State Teachers’ Retirement System (CalSTRS), California Public Employees’ Retirement System (CalPERS), Fiscal Crisis & Management Assistance Team (FCMAT), United States Department of Education (USDE), California Department of Education (CDE), etc.), at the time of the oversight visit, show no outstanding material weaknesses, deficiencies, and/or findings; 5. Vendors and staff are consistently paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school consistently adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved 	<p><u>Existing Schools (based on the most current annual audit):</u></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 annual independent audit shows no material weaknesses, deficiencies and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., CalSTRS, CalPERS, FCMAT, USDE, CDE, etc.), at the time of the oversight visit, show outstanding findings, and the school is able to demonstrate evidence of remedies in addressing these findings; 5. Vendors and staff are generally paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, 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;



An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].

An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].

- LCAP submitted to the appropriate agencies, are posted on the charter school’s website;
- 13. The LCAP is submitted to the appropriate agencies;
- 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are consistently processed or submitted by the charter school in a timely manner;
- 15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement;
- 16. If applicable (when audited and unaudited actuals do not mirror each other), adequate explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;
- 17. Proper segregation of duties is consistently in place;
- 18. If applicable, there are no outstanding fiscal-related tiered intervention notices issued to the school; or the school has no tiered intervention notices as of the oversight report issuance date; and
- 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are fully met by the required deadline(s); or the school has no fiscal benchmarks in its current charter term.

- 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are generally processed or submitted by the charter school in a timely manner;
- 15. There are no significant recurring issues cited in the Areas Noted for Further Growth and/or Improvement;
- 16. If applicable (when audited and unaudited actuals do not mirror each other), at least partial explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;
- 17. Proper segregation of duties is generally in place;
- 18. If applicable, the charter school is in the process of resolving outstanding fiscal issues cited in a Notice issued by the CSD as part of its tiered intervention process; and
- 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are partially met by the required deadline(s).

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

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SUPPLEMENTAL CRITERIA

- 1. The school maintains the minimum reserve for economic uncertainties 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 (i.e., 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’s expenses;

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- 2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses;
- 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);



<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished</u> [Rating of 4].</i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient</u> [Rating of 3].</i></p>
<ol style="list-style-type: none"> 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); 4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%); 5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and 6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings. 	<ol style="list-style-type: none"> 4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%); 5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and 6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

<p><i>An existing school that, at a minimum, meets all of the Required Criteria, and at least 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 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; net assets are negative with strong trend towards becoming positive (be positive at the end of the third year per the applicable interim financials); or 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; 2. The cash balance at the beginning of the school year is positive; and 3. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term. <p><u>Supplemental Criteria</u></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>	<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> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



An existing school that, at a minimum, meets all of the Required Criteria, and at least 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:

1. The school maintains the minimum reserve for economic uncertainties 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 (i.e., 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’s expenses;
3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);
4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);
5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and
6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

A new school that, at a minimum, 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:

New Schools:

New Schools:

REQUIRED CRITERIA

1. Interim reports and/or unaudited actuals project positive net assets;
2. 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;
3. If enrollment is significantly below the enrollment per the school’s *Pupil Estimates for New or Significantly Expanding Charters* 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 viable three-year budget and three-year cash flow projections;

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 *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.*



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

- 4. Governing Board adopts the annual budget;
- 5. The governing board reviews and discusses the charter school’s financial reports as evidenced by the governing board meeting minutes;
- 6. Reasonable requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner;
- 7. The most current governing board-approved LCAP is posted on the charter school’s website; and
- 8. The LCAP is submitted to the appropriate agencies.

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

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

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 and will be noted in the evaluation.