



Palisades Charter High School

Board Meeting

Date and Time

Tuesday December 8, 2020 at 5:00 PM PST

Location

Join from a PC, Mac, iPad, iPhone or Android device:

Please click this URL to join. <https://go.palihigh.org/BoardOfTrusteesLive>

Passcode: dolphins

Or join by phone:

Dial (for higher quality, dial a number based on your current location):

US: +1 669 900 9128 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799 or +1 646 558 8656 or +1 301 715 8592

Webinar ID: 852 0989 9342

Passcode: 34155156

International numbers available: <https://palihigh-org.zoom.us/j/kqRp0Z0mt>

*As per Executive Order N-29-20 from Governor Newsom, the Palisades Charter High School Board of Trustees meeting scheduled for Tuesday, December 8, 2020, at 5:00p.m. will move to a virtual/teleconferencing environment. **Calling into the meeting may incur a charge and PCHS is not responsible for any charges.***

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY: Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board of Palisades Charter High School may request assistance by contacting the Main Office at (310) 230-6623 at least 24 hours in advance.

SUPPORTING DOCUMENTATION:

Supporting documentation is available at the Main Office of the School, located at 15777 Bowdoin Street, Pacific Palisades, CA 90272, (Tel: 310- 230-6623) and may also be accessible on the PCHS website at <http://palihigh.org/boardrecords.aspx>.

ALL TIMES ARE APPROXIMATE AND ARE PROVIDED FOR CONVENIENCE ONLY:

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice. All items may be heard in a different order than listed on the agenda.

Agenda

| | Purpose | Presenter | Time |
|-------------------------|---|----------------|----------------|
| I. Opening Items | | | 5:00 PM |
| Opening Items | | | |
| A. | Call the Meeting to Order | Leslie Woolley | |
| B. | Introduce Representative from Young, Minney, and Corr | Leslie Woolley | 2 m |
| C. | Record Attendance and Guests | | 2 m |
| D. | Public Comment | | 20 m |

Public Comment Procedure for Zoom/Teleconference Board of Trustees Meeting:

General Public Comment via Zoom is available to all audience members who wish to speak on any *non-agenda* item at the beginning of the meeting, which is limited to 30 minutes. Public Comment may also be made on any *agenda* item when that item is addressed. To make a Public Comment via Zoom using a computer or cell phone, please use the “raise hand” function during the public comment section and the Chair will unmute you when it is your turn to speak. If you are using a Chromebook, please join the meeting from your browser. If you are dialing into the meeting, dial *9 to raise your hand and you will be prompted to unmute when it is your turn. Your Zoom username will be visible on screen during the meeting.

A Google form is available for Public Comment if you are unable to join via Zoom. Please refer to the Dewey Dolphin email or copy/paste this link <https://forms.gle/xfsnzwRJNJosyyY37>. Your comment will be read aloud by the Board Chair. General public comments not read after 30 minutes will be included in the meeting minutes. Due to public meeting laws, the Board can only listen to your

Purpose Presenter Time

comment, not respond or take action. Comments are limited to two (2) minutes, per person and one cannot cede their time to another. A member of the public who requires the use of a translator, in order to receive the same opportunity as others to directly address the Board, shall have twice the allotted time to speak, and the total allocated time shall be appropriately increased as well. Govern Code § 54954.3(b)(2).

| | | | | |
|-----------|---|------|----------------|-----|
| E. | Election of Chairperson of the Board, Based on Resignation from the Officer Position by Current Chairperson (PCHS Bylaws, Art. VII sections 3, 6, 7). | Vote | Leslie Woolley | 5 m |
|-----------|---|------|----------------|-----|

| | | | | |
|-----------|--|-----------------|----------------|-----|
| F. | Approve Minutes | Approve Minutes | Leslie Woolley | 2 m |
| | Approve minutes for Board Meeting on November 17, 2020 | | | |

II. Organizational Reports 5:31 PM

| | | | | |
|-----------|---|-----|--|-----|
| A. | Student Report | FYI | Isabel Gill | 5 m |
| B. | Parent Report | FYI | Sara Margiotta, James Wells, Jewlz Fahn | 5 m |
| C. | Classified Staff Report | FYI | Andrew Paris | 5 m |
| D. | Faculty Report | FYI | Paula Anderson, Brenda Clarke, John Rauschuber | 5 m |
| E. | Human Resources Director (HR) Report | FYI | Amy Nguyen | 5 m |
| F. | Director of Operations Report | FYI | Don Parcell | 5 m |
| G. | Director of Development Report | FYI | Mike Rawson | 5 m |
| H. | Chief Business Officer (CBO) Report | FYI | Juan Pablo Herrera | 5 m |
| I. | Executive Director/Principal (EDP) Report | FYI | Dr. Pam Magee | 5 m |

III. Board Committees (Stakeholder Board Level Committees) 6:16 PM

| | | | | |
|-----------|--|-----|----------------|-----|
| A. | Academic Accountability Committee | FYI | Various | 5 m |
| B. | Budget & Finance Committee | FYI | Sara Margiotta | 2 m |
| C. | Post Retirement/Lifetime Healthcare Benefits | FYI | Various | 2 m |

| | Purpose | Presenter | Time |
|--|---------|---------------------------------|---|
| D. Election Committee | FYI | Brooke King | 2 m |
| IV. Academic Excellence | | | 6:27 PM |
| A. Special Education Plan | FYI | Mary Bush | 10 m |
| B. Student Academic Progress and Impact of the Zero | FYI | Tami Christopher and Steve Burr | 10 m |
| | | | • Effective Grading Practices Presentation |
| C. Approval of the PCHS No Show Policy | Vote | Tami Christopher | 10 m |
| V. Finance | | | 6:57 PM |
| A. 2020-2021 First Interim Financial Report | FYI | Juan Pablo Herrera | 5 m |
| B. Approval of the LCFF Budget Overview for Parents for 2020-21 as required by CDE | Vote | Juan Pablo Herrera | 5 m |
| VI. Facilities/Operations | | | 7:07 PM |
| A. Transportation Update | FYI | Don Parcell | 5 m |
| B. Operations Updates | FYI | Don Parcell | 5 m |
| VII. Governance | | | 7:17 PM |
| Governance | | | |
| A. Approval of Request for Opinion from FPPC Regarding Conflict of Interest Questions | Vote | Jerry Simmons | 5 m |
| B. Review and Discussion of Current Committee Structure | Vote | Lisa Corr | 5 m |
| | | | • Including who is eligible to serve on committees, how officers of committees are selected, who has the right to vote on committees, how members are selected to serve on committees and who determines the work plan of committees. |
| VIII. New Business / Announcements | | | 7:27 PM |

| | Purpose | Presenter | Time |
|---|---------|-------------------------|----------------|
| A. Announcements / New Business | FYI | Leslie Woolley | 1 m |
| <ul style="list-style-type: none"> • Date of the next Board Meeting is Tuesday, January 12, 2020 at 5pm | | | |
| B. Announce items for closed session, if any. | FYI | Leslie Woolley | 1 m |
| IX. Closed Session | | | 7:29 PM |
| A. Conference with Legal Counsel | Vote | | 5 m |
| <ul style="list-style-type: none"> • (Significant exposure to litigation pursuant to paragraph (2) or (3) of subdivision (d) of Section 54956.9) | | | |
| B. Public Employee Discipline/Dismissal/Release | Vote | Amy Nguyen, Mark Bresee | 10 m |
| <ul style="list-style-type: none"> • (Govt. Code section 54957) (Education Code section 44929.21) | | | |
| X. Open Session | | | 7:44 PM |
| A. Return to Open Session | FYI | Leslie Woolley | 1 m |
| B. Report Out on Action Taken In Closed Session, If Any. | FYI | Leslie Woolley | 1 m |
| XI. Closing Items | | | 7:46 PM |
| A. Adjourn Meeting | FYI | Leslie Woolley | 1 m |

Coversheet

Approve Minutes

Section: I. Opening Items
Item: F. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board Meeting on November 17, 2020

APPROVED



Palisades Charter High School

Minutes

Board Meeting

Date and Time

Tuesday November 17, 2020 at 5:00 PM

Location

Join from a PC, Mac, iPad, iPhone or Android device:

Please click this URL to join. <https://go.palihigh.org/BoardOfTrusteesLive>

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Dial (for higher quality, dial a number based on your current location):

US: +1 669 900 9128 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799 or +1 646 558 8656 or +1 301 715 8592

Webinar ID: 821 2357 3850

Passcode: 30901494

International numbers available: <https://palihigh-org.zoom.us/j/kA9cNDdnA>

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Trustees Present

Adam Glazer, Andrew Paris, Brenda Clarke, Brooke King, Emily Hirsch, Jewlz Fahn, John Rauschuber, Paula Anderson, Sara Margiotta

Trustees Absent

James (Jim) Wells, Leslie Woolley

Ex Officio Members Present

Dr. Pam Magee, Juan Pablo Herrera

Non Voting Members Present

Dr. Pam Magee, Juan Pablo Herrera

Guests Present

Amy Nguyen, Don Parcell, Isabel Gill, Mary Bush, Michael Rawson, Russ Howard, Selene Lam, Tami Christopher

I. Opening Items

A. Call the Meeting to Order

Brenda Clarke called a meeting of the board of trustees of Palisades Charter High School to order on Tuesday Nov 17, 2020 at 5:08 PM.

B. Introduce Representative from Young, Minney, and Corr

Brenda introduced Attorney Jerry Simmons.

C. Record Attendance and Guests

D.

Public Comment

Sara Margiotta read 9 comments.

E. Approve Minutes

Emily Hirsch made a motion to approve the minutes from Board Meeting on 09-22-20.

Andrew Paris seconded the motion.

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

Roll Call

| | |
|-------------------|--------|
| Leslie Woolley | Absent |
| Sara Margiotta | Aye |
| James (Jim) Wells | Absent |
| Emily Hirsch | Aye |
| John Rauschuber | Aye |
| Brooke King | Aye |
| Adam Glazer | Aye |
| Andrew Paris | Aye |
| Paula Anderson | Aye |
| Brenda Clarke | Aye |
| Jewlz Fahn | Aye |

F. Approve Minutes

Paula Anderson made a motion to approve the minutes from Board Meeting on 10-13-20.

Adam Glazer seconded the motion.

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

Roll Call

| | |
|-------------------|---------|
| Paula Anderson | Aye |
| Brenda Clarke | Aye |
| Adam Glazer | Aye |
| Jewlz Fahn | Aye |
| James (Jim) Wells | Absent |
| Emily Hirsch | Abstain |
| Leslie Woolley | Absent |
| Brooke King | Aye |
| Sara Margiotta | Aye |
| Andrew Paris | Aye |
| John Rauschuber | Aye |

G. Approve Minutes

Sara Margiotta made a motion to approve the minutes from Special Board Meeting on 11-10-20.

Adam Glazer seconded the motion.

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

Roll Call

| | |
|-------------------|--------|
| Leslie Woolley | Absent |
| Adam Glazer | Aye |
| Emily Hirsch | Aye |
| Brenda Clarke | Aye |
| Andrew Paris | Aye |
| Brooke King | Aye |
| Sara Margiotta | Aye |
| Paula Anderson | Aye |
| Jewlz Fahn | Aye |
| James (Jim) Wells | Absent |
| John Rauschuber | Aye |

II. Organizational Reports

A. Student Report

Izzy read the Student Report.

B. Parent Report

Jewlz read Parent Report.

C. Classified Staff Report

No report was read.

D. Faculty Report

Brenda read the Faculty Report.

E. Human Resources Director (HR) Report

Stands as submitted.

F. Director of Operations Report

Stands as submitted.

G. Director of Development Report

\$60,000 raised since last meeting. Giving Tuesday.

H. Chief Business Officer (CBO) Report

Juan Pablo read report.

I. Executive Director/Principal (EDP) Report

Pam read report.

III. Board Committees (Stakeholder Board Level Committees)

A. Academic Accountability Committee

Approve the following members:

Malika Mirkasymova-Secretary

Jewlz Fahn-Vice Chair

Brenda Clarke-Chair

Emily Hirsch made a motion to Approve AA Committee Officers.

Jewlz Fahn seconded the motion.

John R advocating for student vote. Izzy Gill asked why students were not able to vote on officers. Reason given student vote is on committee recommendations and is procedural-not on officers. Board will look to refining committee policies.

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

Roll Call

| | |
|-------------------|--------|
| Brenda Clarke | Aye |
| John Rauschuber | No |
| Leslie Woolley | Absent |
| Emily Hirsch | Aye |
| James (Jim) Wells | Absent |
| Andrew Paris | Aye |
| Paula Anderson | Aye |
| Brooke King | Aye |
| Jewlz Fahn | Aye |
| Sara Margiotta | Aye |
| Adam Glazer | Aye |

B. Budget & Finance Committee

Juan Pablo Herrera gave presentation.

C. Post Retirement/Lifetime Healthcare Benefits

Brenda gave presentation of committee makeup.

D. Election Committee

Meeting 12/7/20 2:30-3pm on Zoom

IV. Academic Excellence

A. Recommendations for eLearning Grading Policies

Sara Margiotta made a motion to Approve elearning grading policies as submitted along with the recommendations from the Academic Accountability committee meeting 11/17/20.

Brooke King seconded the motion.

After reviewing the policies across the school and hearing stakeholder input, the Academic Accountability committee is making the following recommendation to the Board of Trustees to pass the grade policies with the following conditions:

1. The faculty review research proving the damaging effect of the zero in a traditional, 100 point grading scale.

1. Douglas B. Reeves, "The Case Against the Zero," Phi Delta Kappan, Vol. 86, No. 4, December 2004, pp. 324-325.

2. Thomas R. Guskey, "Grading policies that work Against Standards...and How to Fix Them," National Association of Secondary School Principals. NASSP Bulletin; Dec 2000; 84, 620; Wilson Education Abstracts pg. 20

3. Marzano, R. J. (2000). Transforming classroom grading. ASCD: Alexandria, VA.

Then, departments can revise missing and late work policies that align with current research and are consistent within the PLC/departments.

1. Continue revising category descriptions so that they are both explicit and consistent so that the grading categories can help students better understand how they are being graded. These revisions will be put into the departmental grading policy.

1. Discuss and plan recovery pathways for reteaching and reassessing students who are not meeting curricular standards, skills, and learning targets for both the fall and spring semesters to minimize academic harm to students. This practice is in line with our Professional Learning Community model of reteaching and reassessing.

The departments are scheduled to meet this Friday, November 20 and the administration is directing the departments to put items A, B, and C on their agendas and report their progress to their administrators and curriculum council.

D. After the department meeting, the Curriculum Council will meet to confer on A, B, C

If there are any changes to be made in the policy on Friday, the changes will be presented for approval of the Board of Trustees.

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

Roll Call

| | |
|-------------------|--------|
| Emily Hirsch | Aye |
| Andrew Paris | Aye |
| Brooke King | Aye |
| Sara Margiotta | Aye |
| James (Jim) Wells | Absent |

Roll Call

John Rauschuber Aye
Leslie Woolley Absent
Brenda Clarke Aye
Paula Anderson Aye
Jewlz Fahn Aye
Adam Glazer Aye

B. eLearning Grades and Consideration of Graduation Requirement Adjustments

Task Force to identify solutions to help students struggling to graduate. Brenda will email committee members to Chris Lee.

V. PCHS Athletics

A. Athletic Conditioning

Russ Howard presented.

Jewlz Fahn made a motion to move forward with sports conditioning, incorporating Russ Howard's plan, starting 11/30/20.

John Rauschuber seconded the motion.

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

Roll Call

Emily Hirsch Aye
Paula Anderson Aye
James (Jim) Wells Absent
Brooke King Aye
Jewlz Fahn Aye
Adam Glazer Abstain
Brenda Clarke Abstain
Sara Margiotta Aye
John Rauschuber Aye
Leslie Woolley Absent
Andrew Paris No

VI. Finance

A. 2020-21 Budget vs Actuals

Juan Pablo presented.

B. 2020-2021 Cash Flow

Juan Pablo presented.

C. Civic Center Permits/Pool Update

Arleta presented.

D. Fiscal Priorities

Juan Pablo presented.

VII. Facilities/Operations

A. Transportation Update

Some Sp Ed transportation has started.

B. Operations Updates

Discussion of LAUSD construction project effect on parking lot-should be complete after winter break.

VIII. Governance

A. Tentative Agreement for PESPU 2020-2021 Modifications to Multi-Year Contract

Sara Margiotta made a motion to Approve the PESPU tentative agreement 1.75% off schedule.

Adam Glazer seconded the motion.

1.75% off schedule

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

Roll Call

| | |
|-------------------|---------|
| Brenda Clarke | Abstain |
| Emily Hirsch | Aye |
| Paula Anderson | Abstain |
| John Rauschuber | Abstain |
| Leslie Woolley | Absent |
| Sara Margiotta | Aye |
| Jewlz Fahn | Aye |
| Adam Glazer | Aye |
| James (Jim) Wells | Absent |
| Andrew Paris | Aye |
| Brooke King | Abstain |

IX. New Business / Announcements

A. Announcements / New Business

Letter to FPPC in process-Jerry Simmons spoke to the questions from Board members

B. Announce items for closed session, if any.

X. Open Session

A.

Return to Open Session

No action taken in closed session.

B. Report Out on Action Taken In Closed Session, If Any.

No action taken in closed session.

XI. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 10:15 PM.

Respectfully Submitted,
Brooke King

Documents used during the meeting

- Faculty Board Report 11_17_2020.pdf
- HR Board Report 11_17_2020.pdf
- Operations Board Report 11_17_2020.pdf
- Development Board Report 11_17_2020.pdf
- CBO Board Report 11_17_2020.pdf
- II.H - Credit Card - Oct 2020.pdf
- EDP Board Report 11_17_2020.pdf
- Schoolwide Goals 2019-2021.pdf
- LTHB Update.pdf
- English Department Grading Policy.pdf
- Mathematics Department eLearning Grading Policy.pdf
- PE eLearning Grading Policy.pdf
- Science eLearning Grading Policy.pdf
- Social Science eLearning Grading Policy.pdf
- Student Weekly Task Sheet .pdf
- Study Seminar eLearning Grading Policy.pdf
- Study Seminar Syllabus (504) Fall 2020.pdf
- Tech Ed eLearning Grading Policy.pdf
- VAPA eLearning Grading Policy.pdf
- World Languages eLearning Grading Policy.pdf

- PCHS Athletic Plan.pdf
- VI.A - 20-21 Budget vs. Actuals 10-31-20.pdf
- VI.B - 2020-2021 Cash Flow Update 10-31-20.pdf
- VI.C - Pool_Permit Update -10-31-20.pdf
- VI.D - Nov Board Meeting Finance Updates_FINAL.pdf
- PESPU Side Letter with Signatures 10_2020.pdf
- Tentative Agreement PESPU 2020_2021_11_2020.pdf

Coversheet

Faculty Report

Section: II. Organizational Reports
Item: D. Faculty Report
Purpose: FYI
Submitted by:
Related Material: Faculty Board Report_12_08_2020.pdf



PALISADES

CHARTER HIGH SCHOOL

Faculty Report Board of Trustees Meeting December 8, 2020

Heading: Teacher Agreement

- There are still questions about the possible hybrid model and when to expect a tentative plan, as well if teachers will return to in-person instruction this school year. Also, there are questions about what is the status of the Friday schedule for students next semester and whether there will be any changes.
- Teachers are still asking about reimbursements for supplies that are used at home. The \$300 per teacher approved at the budget meeting and by the board for that purpose under the learning loss mitigation funds got changed to a very few restricted items and many teachers were denied what they needed. Teachers have not received support for working from home.
- Teachers are trying to be more sensitive to the needs the students including mental health problems, digital divide, workload, diverse learning styles, and parent concerns. Teachers are working individually, and in their PLCs, to address these issues. They appreciate the PD sessions that have been offered to create more awareness about student needs and training on current issues.
- Many teachers who have received computers and other devices over the past few years are upset by bad performance and breaking down of “new devices” questioning if PCHS is ordering workable technology. The same is true for many students who say they can’t complete assignments or get on Zoom with the device they have been issued by Pali. Would it be helpful to survey faculty about their experiences with their PCHS issued devices and ask what would be most useful to them and students as well before agreeing to more purchasing?

Heading: Compliance Issues

- The faculty board members are again requesting the list of questions being sent to our attorneys and the state compliance department addressing roles, responsibilities, and governance of the Board of Trustees and its committees to review prior to submitting the questions.
- Clarification of the committee members, and who is responsible for setting up the meetings and the meeting agendas.
- What is the status of the results of responses to questions for compliance on being included in and voting on committees?

Heading: Lifetime Benefits



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CHARTER HIGH SCHOOL

- What is the future investment strategy?
- Are there plans to borrow money from this fund? If so for what purpose? What would be the approval process to do this?

Heading: Cash Reserves

- What cash reserves update does the school have?
- What is the monthly accounting of the reserves?

Heading: UTLA-PCHS

- UTLA will have email included to add that will not be part of public comments
- UTLA representatives will provide further teacher input as gathered by them

Coversheet

Human Resources Director (HR) Report

Section: II. Organizational Reports
Item: E. Human Resources Director (HR) Report
Purpose: FYI
Submitted by:
Related Material: HR Board Report_12_08_2020.pdf



PALISADES

CHARTER HIGH SCHOOL

Human Resources Board Report

December 8th, 2020

New Hire:

| Name | Classification/Position | Funding | Effective Date |
|-----------------|---|---------|-------------------|
| Andrea Giannone | Teacher - Italian, (Spring 2021 for FMLA temp.) | General | January 11, 2021 |
| Bob Lauterbach | Tech I | General | November 20, 2020 |

Benefits:

A representative from the Social Security office held an online workshop for faculty & staff on December 3rd. Topics covered included understanding your Retirement & Social Security.

Lifetime Health Benefits Health & Welfare committee met with a representative from the actuarial firm and discussed valuation of our current LTHB plan. The committee will meet again in January.

Staffing:

PCHS is looking towards the Spring 2021 semester and possible temporary hiring of additional student academic support. Several of our faculty members assisted students on weekends in November and December to provide support to struggling students. The additional programs are in core classes in Math and English that are requirements for graduation. If the program is found to produce significant positive improvement in academic achievement then we may expand the program for our Spring 2021 semester.

Staffing support is necessary in other areas as well to fully ensure that PCHS is providing our students with opportunities for success. Towards that end it is clear that PCHS will need to hire a full time Education Technology lead. This person will be necessary to ensure that the school has the direction and programs we need to assist all of our students in learning. The Technology department may need to have additional infrastructure and staffing in order to keep up with the increasing demands for tech access for students and staff.

And finally, we have a marked increase in students needing guidance and support in their class scheduling and psychological support. During the next month HR will be studying comparable schools to ensure that PCHS has an appropriate staffing level to support all of our students.

Coversheet

Director of Operations Report

Section: II. Organizational Reports
Item: F. Director of Operations Report
Purpose: FYI
Submitted by:
Related Material: Operations Board Report_12_08_2020.pdf



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CHARTER HIGH SCHOOL

Board of Trustees Meeting Operations Report December 8, 2020

Transportation:

- Generally status-quo
- Stats holding at 414 Registered Riders and 72% (299) have paid their full down-payment

Security/Safety:

- Nothing New to Report – Operations continue as they have been
- Security staff will be increased commensurately whenever students return to campus

Information Technology:

- Technology Team continues to support Faculty/Staff, Students/Parents and PCHS Governance Groups in 100% Remote/Virtual mode.
- IT continuing work on budget-approved purchases/projects. Many things still backordered (student devices, faculty printers, web cams, etc.), but many things also already received/setup/deployed.
- Faculty/Staff Laptops: 84 Ordered, 84 Received, 56 Deployed, 28 Waiting for Faculty Pick-Up
- IT continues to work with the Deans and other stakeholders on Student Code of Conduct and Responsible Use Policy violations that may lead to disruption of the eLearning classroom.
- Final electrical work component of eRate category 2 project is in progress and on-track to be completed and closed out by the end of 2020.
- IT is working with VAPA to optimize the Gilbert Hall/B101 A/V components.
- Preparations have begun to swap out student devices that need to be returned as part of a lease. This will be aligned with the Library semester end book return.
- IT is working with the Academic Achievement Office for the 2020-21 CAASPP testing. This year's test present some significant device access issues.
- It was just discovered that Infinite Campus, as part of a security measure, is now blocking all access to Infinite Campus from outside the United States. We have approximately 35 students known to be out of the country and unable log in to IC for daily attendance. We are working with IC and our Attendance Office to ensure these students are properly accounted for and not penalized.



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Permits & Setups:

- **Permit Revenue for November 2020 is ~\$64,550:**
 - ~\$500 from Facility Rentals (parking for Bay City Trees on Top Tier of Main Campus Lot)
 - ~\$5,800 from Banner Rentals
 - ~\$58,250 from Filming
- Non-Filming Permit Revenues continue to be minimal with the Pandemic and Facilities Closures
- Filming inquiries continue to be steady. Averaging 1-2 shoots per month at this point. Filming on locations has been classified at the State and County/City level as an Essential Business and therefore is permitted to continue to operate during Pandemic and Stay/Safer-at-Home Orders.
- Miramax Feature Film (He's All That – 15 Days) took place in November and planned to come back in Mid-December - Multiple locations around campus, mostly outside. Followed all PCHS COVID guidelines and per LACDPH and LA County filming guidelines a COVID Compliance Team was required on site every single day.
- Other filming that took place -- Dicks Sporting Goods (1 day shoot, still photography – outdoor only, November 22), Short Film (1 day shoot, Nov 27)
- Potential Filming – Music Video (Late Dec), Sports Commercial (Late Dec), Viacom Production (40 day shoot, Jan/Feb Timeframe).
- Continuous requests from outside groups about renting facilities to hold events, which at this time we are unable to do unless they are filming or Pool related.
- Banner demand is slowly increasing...on top of this being the time that we promote our local elementary schools and their events we are also being asked to promote local restaurants and real estate agents.

MGAC/Pool:

- MGAC/Pool opened Thu 10/15 for Lap Swim only for Community Members and Permit Groups
- Limitations tightened after LACDPH Safer-at-Home Order: Only 1 Swimmer per Lane, and only people >= 18 Years old
- Fiscal Status – Nov 2020 Revenue \$30,200 (Operating hours 11am-3pm)
- Recent Maintenance Repairs/Replacements Projects completed/planned:
 - New Chlorine Tank replacement awaiting delivery of tank/materials
 - Main Drain replacement in process – Scheduled for 12/11
- PCHS should continue accruing/saving for major repairs in the 1-3 year timeframe as major pool components start to reach their useful life of 8-10 years.
 - 1. Re-Plaster Both Pools (~\$250k)
 - 2. Replacement/Backup Competition Pool Pump (~\$35-\$50k)
 - 3. Small Pool Coping Repair and Concrete Deck Repair (~\$25k)



PALISADES

CHARTER HIGH SCHOOL

Facilities/Projects - Ongoing Day-to-Day Operations/Facilities Support:

- **General:**
 - Disinfecting/Cleaning of Spaces Used Regularly: Classrooms, Bathrooms, A-Bldg, etc.
 - Electrostatic & RYOBI Disinfecting of larger spaces as/when needed
 - MGAC/Pool – Regular Janitorial Services plus Disinfecting between user groups
 - Filming - Custodial staff cleaning/disinfecting after each on-campus filming session
- **Common Area Hand-Sanitizer Dispensers Installed** – Additional units installed around campus. We now have 20 units around campus
- **PPE:** Additional PPE obtained re bottles of hand sanitizer, face shields, cloth masks, medical masks, etc.
- **Plexi-Glass Shields:** Received (10) 3' x3' acrylic sheets along with brackets to produce (10) additional sneeze guards as needed.
- **A-Bldg. Exterior Door** - Bottom closer replaced. Was preventing from self-closing.
- **Bungalow/Trailer Ramps** – Repainted with anti-slip paint
- **U101–U104 Walkway** – Rebuilding of termite infested and water damaged walkway completed
- **PE Tunnel – Damaged** conduit pipes for PA, Fire Alarm and Phone wires repaired
- **Gilbert Hall** – Demo'd portion of Gilbert Stage to further asses termite damage.
- **Gilbert Quad** – New trench dug to provide connection of quad tree lighting Gilbert Lawn trees
- **Furniture** – Received 1st of 2 Whiteboards order. (27 new whiteboards for classrooms).
- **Rain Gutter Cleaning/Clearing** - Gilbert/A-Bldg./Mercer/Covered eating area completed
- **U-Bungalows** – Weatherproofing of all windows completed.
- **W120** – Roof coated with sealant to address leaks.
- **Stadium Visiting Side Light pole Electrical Panel** – Termite infested rotted plywood cover top replaced with new metal top to prevent water from entering top.
- **Set Ups** - Assistance with College Center collections for Seniors and Library Books Exchanges
- **Safety:** Checking that all spaces have secure door kits, ropes, emergency escape maps and emergency food and water supplies
- **Ice Machine** – Cafeteria Ice Machine Repair + Regular PM scheduled for this coming week of December 7th.
- **Mercer Hall** – Replace broken Pocket Doors to A/V Closet with Standard Swing Doors

Facilities/Projects - Larger Scale Projects:

- **Long-Term Underground Utilities Infrastructure Replacement Project (LAUSD Bond Funded).**
 - Phase 1 on-schedule to be completed this month
 - Phase 2 or 5 being planned by LAUSD now. Rumored to not be starting until 3/1/2021
- **Gym A/C Project (LAUSD Bond Funded)** – Delayed until 2022

Coversheet

Director of Development Report

Section: II. Organizational Reports
Item: G. Director of Development Report
Purpose: FYI
Submitted by:
Related Material: Development Board Report_12_08_2020.pdf



PALISADES

CHARTER HIGH SCHOOL

Development Report Board of Trustees Meeting December 8, 2020

| TOTAL FUNDS RAISED TO DATE: | Fund | Prior Report | YTD | Inc/Dec. | Budget |
|--|-------------|---------------------|------------------|-----------------|------------------|
| The PCHS Fund | General | \$218,995 | \$270,759 | \$51,764 | \$500,000 |
| Pali Alumni Fund | General | \$0 | \$0 | \$0 | |
| TOTAL UNRESTRICTED FUNDS RAISED | | \$218,995 | \$270,759 | \$51,764 | \$500,000 |
| CTE Incentive Grant | General | \$173,107 | \$173,107 | \$0 | \$0 |
| Perkins V Grant | General | \$34,746 | \$34,746 | \$0 | \$0 |
| Foundation Grants | General | \$0 | \$0 | \$0 | \$0 |
| Rest. Donations/Pledges - Recd | General | \$30,607 | \$30,607 | \$0 | 0 |
| Rest. Donations/Pledges | General | \$0 | \$0 | \$0 | 0 |
| TOTAL RESTRICTED FUNDS RAISED | | \$238,460 | \$238,460 | \$0 | \$0 |
| TOTAL FUNDS RECEIVED | | \$457,455 | \$509,219 | \$51,764 | \$500,000 |
| TOTAL EXPENSES TO DATE: | | | | | |
| Bacio Design | | | \$1,305 | | \$5,000 |
| L.A. Press Printing | | | \$0 | | \$5,500 |
| American Direct Mail | | | \$2,639 | | \$6,900 |
| Postage | | | \$532 | | \$3,800 |
| Subscriptions | | | \$2,449 | | \$6,000 |
| SafeSave service fees | | | \$2,294 | | \$7,500 |
| Salaries & Benefits (Campus Unification/Development Dir) | | | \$79,620 | | \$159,235 |
| Office supplies | | | \$0 | | \$200 |
| Videography | | | \$0 | | \$1,500 |
| Family Donor Banners | | | \$0 | | \$675 |
| Career Day & Fair Breakfast/Lunch | | | \$0 | | \$0 |
| Donor Bricks | | | \$3,586 | | \$1,500 |
| Donor Reception | | | \$0 | | \$0 |
| Chamber Expo | | | \$0 | | \$0 |
| Pali High Booster Club (split donation) | | | \$1,053 | | |
| New Parent Welcome Breakfast | | | \$0 | | \$0 |
| TOTAL EXPENSES FOR UNRESTRICTED FUNDS | | | \$93,478 | | \$197,810 |



PALISADES

CHARTER HIGH SCHOOL

| | | | |
|---|---------------------|--------------------|---------------------|
| TOTAL NET FUNDS | \$415,741 | | \$302,190 |
| CTE Incentive Grant Budget to Date: | Budget | Actual | Balance |
| CTEIG Funds received | | \$173,107.00 | |
| CTEIG Funds rolled over from 2019-20 | | \$63,893.00 | \$237,000.00 |
| Jakus - Film/Media | \$50,000.00 | \$29,999.91 | \$20,000.09 |
| Kolavo - Entrepreneurship/VEI/Sports Management | \$50,000.00 | \$1,800.00 | \$48,200.00 |
| Stoyanovich - Music | \$32,330.00 | \$20,792.99 | \$11,537.01 |
| Steil - Photography | \$32,330.00 | \$5,572.39 | \$26,757.61 |
| Fracchiolla - Drama | \$32,330.00 | \$4,107.97 | \$28,222.03 |
| Kuper - Computer Programming | \$10,010.00 | \$1,647.49 | \$8,362.51 |
| Set aside | \$30,000.00 | \$0.00 | \$30,000.00 |
| | <u>\$237,000.00</u> | <u>\$63,920.75</u> | <u>\$173,079.25</u> |

Comments and Campaigns initiated to date:

- 1.) Joint Appeal with Booster Club sent 8/6/20
- 2.) New Parent Welcome Webinar was heavily attended on 8/17/20 but had major technical difficulties
- 3.) PCHS Fund comparison: \$270,759 this year/\$255,175 last year
- 4.) PCHS Fund donor comparison: 260 this year/336 last year
- 5.) Follow-up Email blast to all families sent 10/9 (\$6,287.50)
- 6.) Working on Virtual Major Donor Reception for the first week of January
- 7.) Working on funding campaign for Pali TV and creating a broadcasting pathway with SMC
- 8.) A fundraising committee of students and parents was formed to create a fundraising plan for teams and all extra-curriculars using the school approved fundraising platforms.
- 9.) Working on #GivingTuesday Campaign (Tuesday, Dec. 1st). Board members will be involved in this peer-to-peer campaign.
- 10.) Year-end campaign to take place during the last week of December
- 11.) Received a gift of \$30,607 from Debbie Williams to support Special Ed
- 12.) #Giving Tuesday campaign brought in \$45,124.40. Goal was \$25,000
- 13.) A mailing to 1,700 families who gave last year but not this year will be sent Dec. 9th

Grants Submitted to date:



PALISADES

CHARTER HIGH SCHOOL

| Grantor: | Amount | Purpose | Date Submit |
|-------------------------------------|---------------------|--------------------------------------|--------------------|
| Steinmetz Foundation | \$5,000.00 | Academic Equity | 12/9/2019 |
| CTE Incentive Grant | \$173,107.00 | CTE Funds for 2020-21 | 11/15/2020 |
| Perkins V Grant | \$34,747.00 | 21 | 7/15/2020 |
| FEMA 4482 DR | \$71,315.00 | FEMA Disaster Relief Fund | 4/1/2020 |
| Lewis A. Kingsley Foundation | \$10,000.00 | Program Support | 8/11/2020 |
| William C. Bannerman Found. | \$7,000.00 | Albert.IO | 10/6/2020 |
| Mara W. Breech Foundation | \$10,000.00 | Teacher Professional Development | 10/12/2020 |
| GRAMMY Museum Grant | \$10,000.00 | Storage Unit for musical instruments | 10/29/2020 |
| Calif. Com. Schools Partnership | <u>\$100,000.00</u> | Expand strategies during Coronavirus | 12/4/2020 |
| | \$421,169.00 | | |

Grants Received to date:

| Grantor: | Amount | Purpose | Date Rec'd |
|------------------------------|--------------------|---------------------------|-------------------|
| CTE Incentive Grant | \$173,107.00 | CTE Funds for 2020-21 | 6/30/2020 |
| Perkins V Grant | \$34,747.00 | Perkins Funds for 2020-21 | 9/15/2020 |
| Lewis A. Kingsley Foundation | <u>\$10,000.00</u> | Program Support | 8/18/2020 |
| | \$217,854.00 | | |

Coversheet

Chief Business Officer (CBO) Report

Section: II. Organizational Reports
Item: H. Chief Business Officer (CBO) Report
Purpose: FYI
Submitted by:
Related Material: II.H - Credit Card - Nov 2020.pdf
CBO Board Report_12_08_2020.pdf

Palisades Charter High School
 Credit Card Reconciliation Form
 For the Period of: 11/1/20- 11/30/20

PLEASE COMPLETE

| Date | Vendor | Description of Expense | Cardholder | Requested By | Amount | Resource | Budget Category |
|------------|--|------------------------------|------------|---------------|-----------|----------|-----------------|
| 11/2/2020 | INDEED 203-564-2400 CT | Job Advert | P MAGEE | A NGUYEN | \$ 166.06 | GENERAL | ADVERT |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | B CLARKE | \$ 150.00 | TITLE 2 | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | T CHRISTOPHER | \$ 150.00 | TITLE 2 | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | M BUSH | \$ 150.00 | TITLE 2 | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | M IANNESSA | \$ 150.00 | TITLE 2 | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | A NGUYEN | \$ 150.00 | GENERAL | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | P MAGEE | \$ 150.00 | GENERAL | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | C LEE | \$ 150.00 | TITLE 2 | CONFERENCE |
| 10/30/2020 | CALIFORNIA CHARTER SCHOOL LOS ANGELES CA | CCSA Conference Registration | P MAGEE | JP HERRERA | \$ 150.00 | GENERAL | CONFERENCE |
| 11/2/2020 | MAILCHIMP *MONTHLY MAILCHIMP.COM GA | monthly communications blast | P MAGEE | P MAGEE | \$ 84.99 | GENERAL | SUBSCRIPTIONS |
| 11/4/2020 | ASS CAL SCH ADMIN 650-692-4300 CA | Virtual Conference | P MAGEE | P MAGEE | \$ 259.00 | GENERAL | CONFERENCE |
| 11/5/2020 | WPY*EDTEC 855-469-3729 CA | PD Training | P MAGEE | P MAGEE | \$ 250.00 | GENERAL | CONFERENCE |
| 11/6/2020 | DROPBOX*TGMR3VWX2VF1 DB.TT/CHELP DE | virtual storage | P MAGEE | P MAGEE | \$ 199.00 | GENERAL | SUBSCRIPTIONS |
| 11/23/2020 | ASSOC OF CA SCHOOL ADMIN 650-692-4300 CA | Membership Fee | P MAGEE | P MAGEE | \$ 755.40 | GENERAL | SUBSCRIPTIONS |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Grand Total **2,914.45**



CBO REPORT

Juan Pablo Herrera

Board of Trustees Meeting
12/08/2020

Business Updates

■ Audit:

- *Audit is on-track and going as planned. Deadline is 3/15/21.*

■ Charter School Pooled TRAns (California School Finance Authority)

- *Potential TRAns program, transparent & low-cost borrowing: 1.5% - 3% interest rate*
- *Can borrow up to \$5.2 Million (determined by our level of cash deferrals)*
- *If we want/need to participate, BOT approval required by early Feb.*



■ Cafeteria

- *Approved for Seamless Summer Option (SSO) which allows us to be reimbursed for every meal served.*
- *Are now able to serve/offer grab-and-go meals to any child under 18, regardless of Free/Reduced eligibility.*
- *Contactless meal pick-up twice per week, curbside (not on campus).*
- *Flexible pick-up options: ID not required, student presence not required, no bar code, etc.*
- *Can now provide nutritious meals to our students and communities in need.*

■ Attendance

- *Held harmless” and are funded based on prior year ADA. However, current ADA may impact funding level in 2021-22.*

■ Payroll

- *Board approved PESPU +1.75% bonus to be paid on 12/17/2020*

State Budget Update

- Legislative Analyst Office (LAO) issued the Fiscal Outlook on the 2021-22 Budget for California
- During the early months of the COVID pandemic (May 2020), California officials projected lower tax revenues as part of the 2020 Budget Act
- The LAO report indicates a fast economic rebound driven by the “Big Three” taxes: personal income tax, sales tax, corporation tax: Increased revenues of +\$11B - \$12B
 - *Personal Income Tax (Wealthy Californians): Generated +\$8.8 Billion more than expected*
- Given the projections, the LAO has recommended that the Governor reconsider future funding levels:
 - *Revisit deferrals (Feb 2021 – June 2021)*
 - *Evaluate use of one-time relief funds*
 - *Pay down long-term obligations (CA is projecting a \$17 Billion deficit by 2024)*
- While the increased revenues are great news, there are still a lot of unknowns and the LAO recommendation is to **budget conservatively**

Looking Ahead

- Continually monitoring monthly cash flow
- 1st interim: Due 12/15
 - Will be presented as a separate agenda item
- Budget Overview for Parents: Due 12/15
 - Will be presented as a separate agenda item as part of a Public Hearing
- Evaluate/Explore Investment Options for Lifetime Health Benefits
 - *Still in development, exploring creation of new investment oversight committee*

Contact: Juan Pablo Herrera

- 310-230-7238 or jherrera@palihigh.org

Coversheet

Executive Director/Principal (EDP) Report

Section: II. Organizational Reports
Item: I. Executive Director/Principal (EDP) Report
Purpose: FYI
Submitted by:
Related Material: EDP Board Report_12_08_2020.pdf
PALIHS 8798 Oversight Report 2019-2020 FINAL.pdf



PALISADES CHARTER HIGH SCHOOL

Executive Director/Principal Report Board of Trustees Meeting December 8, 2020

Our mission: PCHS will empower our diverse student population to make positive contributions to the global community by dedicating our resources to ensure educational excellence, civic responsibility, and personal growth.

School Reopening Updates

COVID-19 cases in California and LA County continue to increase to the highest levels since the start of the pandemic. PCHS plans to continue in 100% eLearning until health and safety conditions improve. We will be coordinating with our collective bargaining partners to ensure a plan is approved and in place when students and staff are safely able to return to campus on a limited basis. As has been the case throughout the pandemic, we anticipate changes in state and county directives. The introduction of a vaccine will likely influence conditions necessary for schools to reopen. PCHS is committed to providing a safe educational environment and will continue providing eLearning throughout the 2020-21 school year to those families who are more comfortable with that option. PCHS will continue our focus on providing the supports needed to ensure learning continues and, where gaps persist, is improved.

Reassurances for the PCHS School Community

- Plan on starting the new year in 100% eLearning mode.
- PCHS will provide the school community with as much lead time as possible regarding changes.
- Collective bargaining partners will be involved in developing and approving the final hybrid plan for students to return to campus on a limited basis.

Asynchronous Friday Schedule

With the ongoing eLearning model in mind, PCHS is reviewing the Asynchronous Friday schedule which has received mixed reviews from students, parents and faculty. In addition to stakeholder surveys, this has been discussed in the Long Term Strategic Planning Academic Achievement and Innovation group and in the Academic Accountability Board level committee. All of the feedback is being reviewed to determine the best plan for second semester. After a proposal is developed and reviewed, depending on the negotiable nature of the changes proposed, Administration and UTLA will work together to develop a side letter of agreement to the MOU that is in place throughout the eLearning period.

Schoolwide Goal: PCHS will utilize communication systems currently in place to convey PCHS's strengths, needs, data, and opportunities for participation so that all stakeholders are well-informed and understood.



PALISADES

CHARTER HIGH SCHOOL

Schoolwide Goal: PCHS will improve consistency in instructional curriculum, policies, and practices to increase student-centered learning.

Grading for Equity

The schoolwide focus on grading practices and policies during eLearning has highlighted a need for a deeper analysis of our school philosophy and approach to grading for equity. PCHS will begin a study of research pertaining to effective grading practices including those implemented in similar schools. We are starting our research with reading *Grading for Equity* by Joe Feldman and *Charting a Course to Standards Based Grading* by Tim Westerberg.

Schoolwide Goal: PCHS will improve consistency in instructional curriculum, policies, and practices to increase student-centered learning.

Schoolwide Goal: PCHS will commit to equitable policies and practices to ensure PCHS's diverse student population has access to academic opportunities.

LAUSD Charter School Division Annual Compliance Audit

The LAUSD Charter School Division Annual Compliance Audit is underway. This year's culminating visit will take place virtually. Planning begins during December with the Charter School Division team. Separate audits are coordinated for Finance, Facilities, and Academics. Categories assessed are 1) Governance, 2) Student Achievement and Educational Performance, 3) Organizational Management, Programs, and Operations, and 4) Fiscal Operations. The culminating report of the 2019-2020 audit is included in the meeting materials.

CASSP Testing

CASSP refers to the California Assessment of Student Performance and Progress system. The PCHS CAASPP testing window is April 12th - May 14th with make-up testing the following week. Currently, the state assessment plan requires all students to test in-person on digital devices.

[PCHS Guiding Documents/School Vision, Accountability and Compliance:](#)

As PCHS enters the mid-point of the school year, we are taking stock of the goals and guiding documents of our school. In addition to the PCHS Charter, PCHS implements multi-year action plans created with stakeholder input. These guiding plans are also mandatory for state and charter authorization compliance. PCHS has worked to establish a foundation of consistency and continuity to ensure a streamlined focus on prioritized areas throughout the various plans.

- [PCHS Charter 2020-2025](#)
- [WASC Action Plan for Equity 2018-2025](#)



PALISADES

CHARTER HIGH SCHOOL

- 6-year accreditation (highest award)
- Mid-term check-in report due June, 2021
- Monitored by Long Term Strategic Planning and Board Committees
- [LCAP \(Local Control Accountability Plan/Learning Continuity and Attendance Plan\)](#)
 - Annual report to State.
 - Component of authorizer oversight
 - Monitored by Long Term Strategic Planning and Budget Committee
- [PCHS Schoolwide Goals 2018-2021](#)
- [School Accountability Report Card \(SARC\)](#)
California public and nonpublic, nonsectarian schools annually provide information to the community to allow public comparison of schools for student achievement, environment, resources and demographics. Annual reports are for the prior school year.

PCHS has conducted multiple focused studies to inform the broader guiding documents including the Collaborative Equity Study, PCHS Technology Plan, and PCHS Safety Plan.

Articulation with Community Educational Partner Paul Revere Charter Middle School

- PCHS commends the leadership of Paul Revere Charter Middle School, our local feeder school. Principal Tom Ianucci and Assistant Principal of Guidance and Counseling, Brett Shibatta have been valuable thinking partners and student advocates with Pali. Through their outreach, our schools have coordinated articulation with our Mental Health Teams and are planning joint parent information meetings. Math departments at both school are working with the UCLA Curtis Center to develop professional development. At Pali the Curtis Center is assisting with plans to prevent and address learning loss during eLearning. In this critical moment when community is more important than ever, we are grateful for our partnership with PRCMS!

Virtual Prospective Parent Tours

- Virtual tours with Assistant Principals Tami Christopher, Russ Howard, Mary Bush Dr. Magee and the Pali Ambassadors were held in October and November. **The next tour dates are December 16 at 2pm and January 20 at 6pm.** Sign up for Virtual Tours [HERE](#). Zoom meetings and Q & A sessions with school personnel and student Ambassadors provide an opportunity for families to learn more about PCHS during quarantine.

Schoolwide Goal: PCHS will utilize communication systems currently in place to convey PCHS's strengths, needs, data, and opportunities for participation so that all stakeholders are well-informed and understood.



PALISADES

CHARTER HIGH SCHOOL



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2019-2020 SCHOOL YEAR (REMOTE VERSION)**

FOR

PALISADES CHARTER HIGH (LOC. CODE 8798)

Name and Location Code of Charter School

LAUSD Vision

Every student will receive a quality education in a safe, caring environment, and will be college-prepared and career-ready.

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/29/2020

| | | | | | | |
|---|--|---|---------------------------------|--|---|-------------|
| Charter School Name: | | Palisades Charter High | | | Location Code: | 8798 |
| Current Address: | | City: | ZIP Code: | Phone: | Fax: | |
| 15777 Bowdoin Street | | Pacific Palisades | 90272 | 310-230-6623 | 310-454-6076 | |
| Current Term of Charter: | | | LAUSD Board District: | LAUSD District: | | |
| July 1, 2015 to June 30, 2020 | | | 4 | West | | |
| Number of Students Currently Enrolled: | | Enrollment Capacity Per Charter: | Grades Currently Served: | | Grades To Be Served Per Charter: | |
| 3,031 | | 3,000 | 9-12 | | 9-12 | |
| Total Number of Staff Members: | | Certificated: | 161 | Classified: | 104 | |
| 265 | | 161 | | 104 | | |
| Charter School's Leadership Team Members: | | Dr. Pam Magee, Executive Director; Don Parcell, Director of Operations; Greg Wood, Chief Business Officer; Amy Nguyen, HR Director; Monica Iannessa, AP Curriculum and Instruction; Chris Lee, AP Academic Programs and Counseling; Mary Bush, AP Student Support Services; Tami Christopher Hooker, AP Attendance; Russell Howard, AP Athletics and Discipline | | | | |
| Charter School's Contact for Special Education: | | N/A | | | | |
| CSD Assigned Administrator: | | Christine Kae | | CSD Fiscal Services Manager: | Allan Villamor | |
| Other School/CSD Team Members: | | N/A | | | | |
| REMOTE Oversight Visit Date(s): | | 4/29/2020 | | Fiscal Review Date (if different): | N/A | |
| Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.): | | Yes, Conversion Independent Charter with Sole Occupant Agreement | | LAUSD Co-Location Campus(es) (if applicable): | N/A | |
| | | | | DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM: | N/A | |

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/29/2020

CHARTER RENEWAL CRITERIA

In accordance with Education Code §§ 47605 and 47607, in order to renew a charter, the District must determine whether the charter school has met the statutory requirements. Pursuant to the requirements of SB 1290, the District “shall consider increases in pupil academic achievement for all groups of pupils served by the charter school as the most important factor in determining whether to grant a charter renewal.” Ed. Code § 47607(a)(3)(A).

REPORT GUIDE

In conducting oversight as a charter school authorizer, the District places an emphasis on performance and compliance with applicable law, policy, and the approved charter, as well as on the lead fiduciary role of a charter school’s governing board in the overall success of the school for students. Information gathered through oversight serves as part of the school’s ongoing record of performance and provides important data for the CSD, LAUSD Superintendent, and ultimately the LAUSD Board of Education in making informed decisions about charter school authorization. In designing this document, the District has considered California charter school law, as well as the 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 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 2019-2020*. The “Sources of Evidence” sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

The tool employs the following four-point rubric to rate the school’s performance in each category: (4) *Accomplished*, (3) *Proficient*, (2) *Developing*, and (1) *Unsatisfactory*. In addition, the *Summary of School Performance* section in each category captures key findings under one or more of the following headings: (1) Areas of Demonstrated Strength and/or Progress (Note: potential “promising practices” are identified within this section with an asterisk [*]); (2) Areas Noted for Further Growth and/or Improvement; and, if applicable, (3) Corrective Action Required. Under “Corrective Action Required,” the CSD reports findings of material noncompliance with applicable law, LAUSD charter policy, or the school’s approved charter. **If the report includes any findings under “Corrective Action Required,” the charter school must take immediate and appropriate steps to remedy the identified concern.** In accordance with its “tiered intervention” approach to charter school non-compliance and poor performance, the CSD may also send the school appropriate notices, separate and apart from this report, to provide and document time-specific follow-up as necessary. At the other end of the spectrum of performance, any school that earns a rating of *Accomplished* in any category is encouraged to submit to the CSD a summary of those “promising practices” that the school believes have contributed to its success, in order to support the CSD’s ongoing efforts to promote and facilitate reciprocal sharing of promising practices among education leaders from across the entire portfolio of LAUSD schools.



LAUSD CHARTER SCHOOLS DIVISION

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| GOVERNANCE | RATING* |
|--|---------|
| Summary of School Performance | 4 |
| <p><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> - G1: Governance Structure and Evaluation of School Leaders – The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a highly developed system for the evaluation of the school leader(s) as evidenced by the Bylaws (approved 11/10/2014, amended 2/16/2016), Board agendas and minutes, Committee meeting calendars, agendas and minutes, and evaluation for the Executive Director. The Board has the following committees: Academic Accountability, Budget and Finance, Charter, Elections, and Post-Retirement/Lifetime Benefits. - G2: Brown Act – The Governing Board complies with all material provisions of the Brown Act. The school posts monthly Board meeting calendar, agendas, and minutes on the school website for the following Board meetings: 8/27/2019, 10/15/2019, 11/5/2019, 12/10/2019, 1/14/2020, 2/11/2020, 3/31/2020, 4/21/2020, and 5/19/2020. Brown Act Training was provided on 6/22/2019. - G3: Due Process – The Governing Board has a highly developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public, as evidenced by the Parent Student Handbook, Uniform Complaint Procedures and forms, Williams Complaint form, Human Resources Policy, tiered behavior and intervention program and systems, and multiple means for communicating with stakeholders. - G4: Staffing – The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements as evidenced by the HR Policies and ESSA grid. <p><u>Areas Noted for Further Growth and/or Improvement</u> None</p> <p><u>Corrective Action Required</u> None noted that require immediate action to remedy concerns indicated in this report.</p> <p>Notes: None</p> | |



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



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

| <p><i>The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:</i></p> <ul style="list-style-type: none"> Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations Evaluation of school's executive level leadership | | |
|--|---|--|
| | Rubric | Sources of Evidence |
| Performance | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a highly developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a partially developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter or any mandated committees/councils, and no system for the evaluation of the school leader(s) | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Organizational chart (B1.1) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas, and minutes (B1.4) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1.7) <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify) |

G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

| <p><i>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:</i></p> <ul style="list-style-type: none"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition Governing Board meeting agendas and minutes are posted and maintained, as appropriate, including on the school's website and in accordance with the Brown Act and with sufficient specificity | | |
|---|--------|---------------------|
| | Rubric | Sources of Evidence |



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| | | |
|--------------------|---|---|
| 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 (B1.8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1.9) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) COVID-19 UPDATE – Board Meetings |
|--------------------|---|---|

G3: DUE PROCESS - GOVERNANCE QUALITY INDICATOR #3

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

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

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



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G4: STAFFING - GOVERNANCE QUALITY INDICATOR #4

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

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

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



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DATE OF VISIT: 4/29/2020**G5: DATA-BASED DECISION-MAKING - GOVERNANCE QUALITY INDICATOR #5**

| <i>The Governing Board has a system in place to ensure ongoing:</i> | |
|--|--|
| <ul style="list-style-type: none"> Review and use of academic and other internal school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence Monitoring of the school's implementation of its LCAP action plans and progress toward LCAP goals | |
| Rubric | Sources of Evidence |
| Performance <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and other internal data (B1.4) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify) |

G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6

| <i>The Governing Board has a system in place to ensure fiscal viability:</i> | |
|--|--|
| <ul style="list-style-type: none"> The school is fiscally strong and net assets are positive in the prior two independent audit reports. | |
| Rubric | Sources of Evidence |
| Performance <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input type="checkbox"/> The school is fiscally weak (e.g., inadequate cash flow, etc.) and/or net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division <input type="checkbox"/> The school is consistently fiscally weak (e.g., inadequate cash flow, etc.) and/or net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below) |



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

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

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

| |
|--|
| <p>Progress on LAUSD Board of Education and/or MOU Benchmarks related to GOVERNANCE (if applicable):</p> <p>N/A</p> |
|--|



LAUSD CHARTER SCHOOLS DIVISION

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| STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE | RATING* |
|---|---------|
| Summary of School Performance | 4 |
| <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> <ul style="list-style-type: none"> - A1: SBAC Subgroup in ELA – In five of the school's six numerically significant subgroups (Asian, African American, Latino, Socioeconomically Disadvantaged, Students with Disabilities, White), the percentage of students who Met or Exceeded performance standards on the CAASPP (SBAC) ELA increased from 2017-2018 to 2018-2019. The performance of the Asian subgroup increased by 2.32 percentage points, from 88.00% to 90.32%. The performance of the African American subgroup increased by 8.21 percentage points, from 54.90% to 63.11%. The performance of the Socioeconomically Disadvantaged subgroup increased by 2.97 percentage points, from 63.57% to 66.54%. The performance of the Students with Disabilities subgroup increased by 0.30 percentage points, from 32.39% to 32.69%. The performance of the White subgroup increased by 6.03 percentage points, from 83.42% to 89.45%. The performance of the Latino subgroup decreased by 0.19 percentage point, from 62.77% to 62.58%. - A3: SBAC Schoolwide ELA – The schoolwide percentage of students who Met and Exceeded Standards on the 2018-2019 CAASPP (SBAC) in ELA of 80.50% is higher by 41.96 percentage points than the Resident Schools Median of 38.54%. - A4: SBAC Schoolwide Math – The schoolwide percentage of students who Met and Exceeded Standards on the 2018-2019 CAASPP (SBAC) in Math of 45.57% is higher by 28.12 percentage points than the Resident Schools Median of 17.45%. - A5: English Learner Reclassification Rate – In 2018-2019, the school's English Learner reclassification rate was 27.6%, which is higher than the Resident Schools Median of 15.6%. - A6: "At Risk" English Learners Percentage – In 2018-2019, the percentage of the school's English learner students who were considered "At Risk" in was 0.5% (2 students), which is lower than the Resident Schools Median of 2.2%. - A7: Long-Term English Learners Percentage – In 2018-2019, the percentage of the school's Long-Term English learner students was 2.9% (13 students), which is lower than the Resident Schools Median of 13.1%. - A8: Four-Year Adjusted Cohort Graduation Rate – In 2018-2019, the school's four-year adjusted cohort graduation rate of 94.9% is higher than the Resident Schools Median of 80.2%. | |



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/29/2020Areas Noted for Further Growth and/or Improvement

- **A2: SBAC Subgroup in Math** – In four of the school’s six numerically significant subgroups (Asian, African American, Latino, Socioeconomically Disadvantaged, Students with Disabilities, White), the percentage of student who Met or Exceeded performance standards on the CAASPP (SBAC) in Math decreased from 2017-2018 to 2018-2019. The performance of the African American subgroup decreased by 8.82 percentage points, from 25.49% to 16.67%. The performance of the Latino subgroup decreased by 8.83 percentage points, from 32.12% to 23.29%. The performance of the Socioeconomically Disadvantaged subgroup decreased by 3.62 percentage points, from 30.34% to 26.72%. The performance of the Students with Disabilities subgroup decreased by 5.48 percentage points, from 15.28% to 9.80%. The performance of the Asian subgroup increased by 8.76 percentage point, from 70.27% to 79.03%. The performance of the White subgroup increased by 1.00 percentage point, from 54.64% to 55.64%. School leadership shared that in response to the decrease in Math performance the following were implemented: Reassignment of veteran teachers to upper grades and increased afterschool intervention for targeted students. For the 2020-2025 Charter Term, the LAUSD Board of Education approved renewal with the following benchmark: The Charter School shall demonstrate at least one performance level growth per academic year, as reported on the California School Dashboard, for “Students with Disabilities” in Math and as measured by CAASPP (SBAC) Assessment at a rate equal to or greater than the Resident Schools, with the goal of achieving and maintaining the “Green” performance level or higher by the end of the charter term. CSD will continue to monitor through oversight.

Corrective Action Required

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

Palisades Charter High’s Reclassification Criteria:

- Assessment of language proficiency, using an objective assessment instrument
- Teacher evaluation
- Parent/Guardian opinion and consultation
- Comparison of student performance in basic skills against an empirically established range of performance in basic skills based on the performance of English proficient students of the same age

Palisades Charter High’s Graduation Criteria: Earn a minimum of 230 credits and meet California proficiency standards.

****NOTE: A charter school cannot receive a rating in this category greater than a 2 if the school has not met the minimum statutory renewal criteria which requires clear and convincing evidence that the academic performance of the charter school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the schools in the school district in which the charter school is located, taking into account the composition of the pupil population that is served at the charter school (e.g. Resident Schools) as measured in indicators A3 and A4.***



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DATE OF VISIT: 4/29/2020**A1: SBAC SUBGROUP ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #1**

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

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school.

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify) |

A2: SBAC SUBGROUP MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #2

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

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school,

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify) |



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DATE OF VISIT: 4/29/2020**A3: SBAC SCHOOLWIDE ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #3***The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- Schoolwide ELA data (CDE)

| Rubric | | Sources of Evidence |
|--------------------|--|---|
| Performance | <input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate similar to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in ELA is substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify) |

A4: SBAC SCHOOLWIDE MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #4*The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:*

- Schoolwide Math data (CDE)

| Rubric | | Sources of Evidence |
|--------------------|--|---|
| Performance | <input checked="" type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate higher than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate similar to the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in Math is at a rate lower than the Resident Schools Median <input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3 rd – 8 th , 11 th Grade on the SBAC in Math is substantially lower than the Resident Schools Median. <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify) |



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

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DATE OF VISIT: 4/29/2020

A5: ENGLISH LEARNER RECLASSIFICATION - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #5

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

- English Learner reclassification rate for 2018-2019 (CDE)

| | Rubric | Sources of Evidence |
|--------------------|---|--|
| Performance | <input checked="" type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input checked="" type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (within “Notes” section above) (B2.4) <input type="checkbox"/> Other: (Specify) |

A6: “AT RISK” ENGLISH LEARNERS – (ELEMENTARY AND SECONDARY SCHOOLS) STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #6

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

- Providing supports for At-Risk English Learners 2018-2019 (CDE)

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> “At-Risk” by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) |



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A7: LONG TERM ENGLISH LEARNERS (LTELs) - (SECONDARY SCHOOLS) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #7

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

- Providing supports for Long Term English Learners 2018-2019 (CDE)

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <input checked="" type="checkbox"/> The school's percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) |

A8: FOUR-YEAR ADJUSTED COHORT GRADUATION RATE - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #8

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

- Four-Year Adjusted Cohort Graduation Rate (CDE) (**high schools only**)

| | Rubric | Sources of Evidence |
|--------------------|--|---|
| Performance | <input checked="" type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school's Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator | <input type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> Graduation Requirements (within "Notes" section above (B2.5)) <input type="checkbox"/> Other: (Specify) <hr/> A-G passing grade requirement (e.g. C or D) (CSD internal use only) |



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***INDICATOR A9 IS ONLY APPLICABLE TO NEW CHARTER SCHOOLS WHICH DO NOT HAVE CAASPP (SBAC) SCORES AND CHARTER SCHOOLS WHICH SERVE GRADE LEVELS K, 1, 2, 9, AND 10 (THE GRADE LEVELS WHICH ARE NOT ADMINISTERED THE CAASPP). Due to COVID-19, the school may be unable to provide accurate data for this indicator. If no data is available, a score will not be earned for this indicator and it will not impact the overall score for the Student Achievement and Educational Performance section.**

A9: INTERNAL ASSESSMENT (Grades K, 1, 2, 9, 10 and New Charter Schools) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #9

The school demonstrates student academic achievement, including progress towards closing the achievement gap, for grades K, 1, 2, 9 and 10 or as a new school with no CAASPP (SBAC) data as measured by:

- The school’s internal assessments (with analysis of results) by subgroups and grade-levels in ELA and Math
- Other academic achievement data gathered or produced by the school, such as Advanced Placement examination participation and passage rates, A-G requirements progress and completion rates, high school graduation rates, and college acceptance rates

NOTE: For purposes of evaluation of school performance for this indicator, the CSD will consider data derived from assessments for which the school can provide evidence of validity/reliability. For commonly used and recognized assessments this would not be necessary (for example, NWEA, DIBELS, Illuminate, or SBA Interim assessments).

| Rubric | | Sources of Evidence |
|--------------------|---|--|
| Performance | <input type="checkbox"/> The school has demonstrated accomplished levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect significant growth in student achievement in ELA and Math for all subgroups in all grade-levels <input type="checkbox"/> The school has demonstrated proficient levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect moderate growth in student achievement in ELA and Math for the majority of subgroups and grade-levels. <input type="checkbox"/> The school has demonstrated developing levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect limited growth in student achievement in ELA and Math for some subgroups and grade-levels <input type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input checked="" type="checkbox"/> No assessment of performance for this indicator. | <input type="checkbox"/> Internal academic performance and progress data and information (B2.2) <input type="checkbox"/> School Internal Assessment Data Report or equivalent (B2.6) <input type="checkbox"/> Other: (Specify) |



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CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS

Summary of School Performance

Indicators A10 – A16 reflect the school’s ratings on the Dashboard. Indicators A10 – A16 will not impact the overall Student Achievement and Educational Performance Rating for 2019-2020 oversight but will provide informational areas of focus.

I. Academic Performance

A10: CAASPP ENGLISH LANGUAGE ARTS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Blue

Change Level: Increased

A11: CAASPP MATHEMATICS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Green

Change Level: Increased

A12: ENGLISH LEARNER PROGRESS

Performance Level Color: Not Applicable

Change Level: Not Applicable

A13: COLLEGE/CAREER (high schools only)

Performance Level Color: Yellow

Change Level: Declined

II. Academic Engagement

A14: CHRONIC ABSENTEEISM

Performance Level Color: Not Applicable

Change Level: Not Applicable

A15: GRADUATION RATE

Performance Level Color: Blue

Change Level: Declined

III. Conditions and Climate

A16: SUSPENSION RATE

Performance Level Color: Green

Change Level: Declined



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NOTES:

None

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

N/A



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| ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS | RATING* |
|--|---------|
| Summary of School Performance | 4 |
| <p><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> - O1: School Safety and Operations: School Safety Plan and Procedures – The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety. The school has evidence of a visitor policy, Pupil Suicide Prevention policy (Board adopted 5/16/2017), School Safety Plan, regularly scheduled emergency drills (Shelter in Place, Earthquake, Fire, Active Shooter), and emergency provisions. - O2: Health and Safety – The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for the following: Sole Occupant Agreement, immunization, approved hearing screenings waiver dated 1/14/2020 from CA Department of Health Care Services, three Epi-pens, 20 staff trained in use of Epi-pen, eight Automated External Defibrillators (AED), and provision of one nutritionally adequate free or reduced priced meal each day to needy students. - O5: Implementation of Key Features of Educational Program – The school has fully implemented the key features of the educational program described in the charter. Key features include The Dolphin Leadership Academy, Pali Academy, 9th Grade Pods, and Career Technical Education Program Pathway. - O7: School Climate and Student Discipline – 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. In 2018-2019, there was a decrease in the suspension rate of 0.4% from 2017-2018 of 2.6%. The following support the school’s Positive Behavior Policy: Multi-tiered Systems of Support, PCHS Wellness Policy, Alternatives to Suspension (including Restorative Saturday classes), tip/help line, peer mediation, and systematic monitoring of student behaviors through Power BI. - O10: Stakeholder Communication and Transparency – The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website. The following information is available on the website: LAUSD Charter School Transparency Resolution, Title IX, UCP procedures, complaint forms, Suicide Prevention Policy, LCAP, financial documents, and access to school-based mental health services. - O12: Clearances and Credentialing Compliance – The school has implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law including clearance, credentialing, and assignment requirements. The school provided evidence of four Custodian of Records. <p><u>Areas Noted for Further Growth and/or Improvement</u></p> | |



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- **O4: Meeting the Needs of All Students: Subgroup Data Analysis** – The school has partially implemented the components of the charter’s instructional program designed to meet the learning needs of all students including its subgroups, and partially modifies instruction based on data analysis. As noted in the Student Academic Achievement and Educational Performance section above, in 2018-2019 CAASPP (SBAC) assessment, schoolwide and subgroups demonstrated declines in Math and the school leadership shared their plan for improvement as noted above.

Corrective Action Required

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

Notes:

None

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



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

The school has a system in place to ensure that:

- The school has a current site-specific comprehensive Health, Safety, and Emergency Plan
(Note: for co-locations, the charter school adheres and complies with the District school’s Health, Safety and Emergency Plan)
- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)
- School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting in accordance with the requirements of AB 1432
- School staff receives annual training on the handling of bloodborne pathogens
- The school has a Visitor’s policy and it’s visible in the main office
- A Pupil Suicide Prevention Policy (grades 7-12) is in place, in compliance with AB 2246

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> (“ESSA Grid”) (B3A.1) <input type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) |



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O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2

The school has a system in place to ensure that:

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

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



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

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

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

| | | |
|---|---------------|----------------------------|
| <p><i>The school:</i></p> <ul style="list-style-type: none"> Implements the differentiation, intervention, and other instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all subgroups identified in the school's LCAP and by CDE Disaggregates and analyzes data on a regular basis to address individual student needs Implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification) Has appointed a designee to assist and support foster youth | | |
| | Rubric | Sources of Evidence |



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| | | |
|--------------------|---|--|
| Performance | <ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and does not consistently modify instruction based on data analysis | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students (B3.3j) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3.3j) <input type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <input type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) – COVID-19 UPDATE – Distance Learning |
|--------------------|---|--|

O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #5

| <i>The school has implemented the key features components of the educational program described in the school's charter</i> | | |
|--|---|--|
| | Rubric | Sources of Evidence |
| Performance | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has partially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has minimally implemented, or not at all, the key features of the educational program described in the charter | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program (B3.3k) <input type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) |



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O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6

Due to COVID-19, information regarding the Special Education program will be documented in the Notes section.

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

- ~~• Provides special education programs and services in accordance with students' IEPs and the terms of the Modified Consent Decree~~
- ~~• Provides special education training for staff in accordance with requirements of the Modified Consent Decree~~
- ~~• 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 | <ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <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, including the Modified Consent Decree <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, including the Modified Consent Decree <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, including the Modified Consent Decree | <ul style="list-style-type: none"> <input type="checkbox"/> Parent Student Handbook(s) (B1.10) <input type="checkbox"/> Professional development documentation (B3.4b) <input type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j) <input type="checkbox"/> Self-Review Checklist (B3.4a) <input type="checkbox"/> Other special education documentation (B3.4a) <input type="checkbox"/> Consultation with Charter Operated Programs office <input type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education (B3.4a) <input type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) |



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

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

- Align with the principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student subgroups
- Per AB 2291, adopt on or before December 31, 2019, procedures for preventing acts of bullying, including cyberbullying

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



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DATE OF VISIT: 4/29/2020**O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8*****The school:***

- 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 | <input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter | <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input type="checkbox"/> Interview of teachers and/or other staff <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) |

O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9***The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:***

- Engages in communication that notifies parents, teachers, pupils and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns
- Provides all stakeholders with appropriate, accessible and relevant information about individual student and schoolwide academic progress and performance
- Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements **(high schools only)**
- Provides parents, teachers, and students with meaningful opportunities for involvement and engagement that meet the requirements and goals of applicable federal and state law, the school's charter, and the school LCAP
- Per AB 1104, schools that maintain any of grades 6-12, inclusive, to identify the most appropriate methods of informing parents and guardians of pupils in those grades of human trafficking prevention resources and to implement the identified methods by January 1, 2020



LAUSD CHARTER SCHOOLS DIVISION

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| | <p style="text-align: center;">Rubric</p> | <p style="text-align: center;">Sources of Evidence</p> |
|---------------------------|---|--|
| <p>Performance</p> | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) grades 6-12 (B3.4d) <input type="checkbox"/> Interview of stakeholders <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) |



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O10: STAKEHOLDER COMMUNICATION AND TRANSPARENCY- ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #10

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

- Information is easily accessible to the public and school stakeholders
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375**
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year

**required on website

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



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

| | | |
|---|---|--|
| <p><i>The school has a system in place for the evaluation of school staff designed to ensure that:</i></p> <ul style="list-style-type: none"> the school’s educational program yields high student achievement the school complies with all applicable legal requirements | | |
| Rubric | | Sources of Evidence |
| Performance | <input checked="" type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements | <input checked="" type="checkbox"/> Documentation related to a system for evaluation of staff and administrator(s) (B3.4f) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) |



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

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

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform schoolsite services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

| | Rubric | Sources of Evidence |
|--------------------|---|---|
| Performance | <input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements | <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) |

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

N/A



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: **Palisades Charter High**

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: **4/29/2020**

| 8798 | 2016-2017 | | | | | 2017-2018 | | | | | 2018-2019 | | | | |
|---|--------------------|-------------------|-------------------|-------------------|--------------------|--------------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| | 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 |
| Palisades Charter High | | | | | | | | | | | | | | | |
| Cash and Cash Equivalents | | 9,448,229 | 9,877,613 | 10,006,165 | 1,247,247 | | 8,906,165 | 9,406,165 | 6,834,021 | 6,833,276 | | 0 | 7,331,522 | 6,260,265 | 6,260,266 |
| Current Assets | | 10,482,959 | 10,909,113 | 10,846,978 | 10,918,915 | | 9,546,978 | 10,006,165 | 9,103,939 | 8,130,406 | | 0 | 8,572,866 | 8,760,182 | 7,727,829 |
| Fixed and Other Assets | | 7,193,444 | 6,750,232 | 7,134,639 | 7,134,639 | | 9,567,927 | 8,162,927 | 8,671,147 | 8,671,146 | | 0 | 8,222,035 | 8,202,173 | 8,201,647 |
| Total Assets | | 17,676,403 | 17,659,345 | 17,981,617 | 18,053,554 | | 19,114,905 | 18,169,092 | 17,775,086 | 16,801,552 | | 0 | 16,794,901 | 16,962,355 | 15,929,476 |
| Deferred Outflow | | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 |
| Current Liabilities | | 2,536,933 | 2,686,500 | 3,466,304 | 3,882,774 | | 3,612,407 | 3,259,409 | 3,669,332 | 3,035,886 | | 0 | 3,093,572 | 3,302,151 | 2,911,884 |
| Other Long Term Liabilities | | 4,406,458 | 4,406,458 | 75,607 | 17,032,371 | | 505,776 | 75,607 | 17,871,486 | 2,119,669 | | 0 | 80,849 | 19,187,939 | 19,779,209 |
| Unfunded OPEB Liabilities/Deferred Inflow | | 0 | 0 | 4,494,015 | 0 | | 4,900,015 | 17,727,504 | 0 | 16,425,129 | | 0 | 18,200,050 | 0 | 0 |
| Total Liabilities | | 6,943,391 | 7,092,958 | 8,035,926 | 20,915,145 | | 9,018,198 | 21,062,520 | 21,540,818 | 21,580,684 | | 0 | 21,374,471 | 22,490,090 | 22,691,093 |
| Net Assets | | 10,733,011 | 10,566,387 | 9,945,692 | (2,861,591) | | 10,096,707 | (2,893,427) | (3,765,732) | (4,779,132) | | (3,340,940) | (4,579,570) | (5,527,735) | (6,761,617) |
| Total Revenues | 30,200,450 | 32,046,865 | 31,801,669 | 32,203,686 | 33,783,224 | 31,991,576 | 33,412,496 | 33,718,777 | 33,861,853 | 35,206,637 | 35,081,037 | 34,902,053 | 34,944,744 | 34,822,242 | 37,253,417 |
| Total Expenditures | 30,197,228 | 31,230,382 | 31,151,809 | 32,174,522 | 34,503,504 | 31,991,576 | 33,261,480 | 33,774,408 | 34,765,994 | 37,124,178 | 35,077,142 | 34,477,261 | 34,745,182 | 35,570,845 | 39,284,013 |
| Net Income / (Loss) | 3,222 | 816,483 | 649,860 | 29,165 | (720,280) | (0) | 151,015 | (55,630) | (904,141) | (1,917,541) | 3,895 | 424,792 | 199,562 | (748,603) | (2,030,596) |
| 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 | 3,222 | 816,483 | 649,860 | 29,165 | (720,280) | (0) | 151,015 | (55,630) | (904,141) | (1,917,541) | 3,895 | 424,792 | 199,562 | (748,603) | (2,030,596) |
| Net Assets, Beginning | 9,988,785 | 9,916,528 | 9,916,528 | 9,916,528 | (2,141,311) | 10,566,387 | 9,945,692 | 9,945,692 | (2,861,591) | (2,861,591) | 9,945,692 | (3,765,732) | (3,765,732) | (3,765,732) | (4,779,132) |
| Adj. for restatement / Prior Yr Adj | 0 | 0 | (1) | (1) | 0 | 0 | 0 | (12,783,489) | 0 | 0 | 0 | 0 | (1,013,400) | (1,013,400) | 48,111 |
| Net Assets, Beginning, Adjusted | 9,988,785 | 9,916,528 | 9,916,527 | 9,916,527 | (2,141,311) | 10,566,387 | 9,945,692 | (2,837,797) | (2,861,591) | (2,861,591) | 9,945,692 | (3,765,732) | (4,779,132) | (4,779,132) | (4,731,021) |
| Net Assets, End | 9,992,007 | 10,733,011 | 10,566,387 | 9,945,692 | (2,861,591) | 10,566,387 | 10,096,707 | (2,893,427) | (3,765,732) | (4,779,132) | 9,949,587 | (3,340,940) | (4,579,570) | (5,527,735) | (6,761,617) |

| 8798 | Audited Financials | | | | | 2019-2020 | | | | |
|---|--------------------|--------------------|--------------------|--------------------|----------|--------------------|--------------------|--------------------|-------------------|--------------------|
| | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | Preliminary Budget | First Interim | Second Interim | Unaudited Actuals | Audited Financials |
| Palisades Charter High | | | | | | | | | | |
| Cash and Cash Equivalents | 796,722 | 1,247,247 | 6,833,276 | 6,260,266 | 0 | | 7,995,349 | 8,097,029 | 0 | 0 |
| Current Assets | 9,807,957 | 10,918,915 | 8,130,406 | 7,727,829 | 0 | | 10,524,306 | 10,625,986 | 0 | 0 |
| Fixed and Other Assets | 7,054,987 | 7,134,639 | 8,671,146 | 8,201,647 | 0 | | 7,731,542 | 7,731,542 | 0 | 0 |
| Total Assets | 16,862,944 | 18,053,554 | 16,801,552 | 15,929,476 | 0 | | 18,255,848 | 18,357,528 | 0 | 0 |
| Deferred Outflow | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 |
| Current Liabilities | 3,143,403 | 3,882,774 | 3,035,886 | 2,911,884 | 0 | | 3,461,667 | 3,429,774 | 0 | 0 |
| Other Long Term Liabilities | 15,860,852 | 17,032,371 | 2,119,669 | 19,779,209 | 0 | | 19,251,739 | 1,318,867 | 0 | 0 |
| Unfunded OPEB Liabilities/Deferred Inflow | 0 | 0 | 16,425,129 | 0 | 0 | | 0 | 19,170,911 | 0 | 0 |
| Total Liabilities | 19,004,255 | 20,915,145 | 21,580,684 | 22,691,093 | 0 | | 22,713,406 | 23,919,552 | 0 | 0 |
| Net Assets | (2,141,311) | (2,861,591) | (4,779,132) | (6,761,617) | 0 | | (4,457,558) | (5,562,024) | 0 | 0 |
| Total Revenues | 32,422,568 | 33,783,224 | 35,206,637 | 37,253,417 | 0 | 35,629,624 | 35,700,586 | 35,783,323 | 0 | 0 |
| Total Expenditures | 33,027,939 | 34,503,504 | 37,124,178 | 39,284,013 | 0 | 34,425,874 | 34,630,409 | 34,583,730 | 0 | 0 |
| Net Income / (Loss) | (605,371) | (720,280) | (1,917,541) | (2,030,596) | 0 | 1,203,750 | 1,070,177 | 1,199,593 | 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 | (605,371) | (720,280) | (1,917,541) | (2,030,596) | 0 | 1,203,750 | 1,070,177 | 1,199,593 | 0 | 0 |
| Net Assets, Beginning | 9,304,215 | (2,141,311) | (2,861,591) | (4,779,132) | 0 | (4,579,570) | (5,527,735) | (5,527,735) | 0 | 0 |
| Adj. for restatement / Prior Yr Adj | (10,840,155) | 0 | 0 | 48,111 | 0 | 0 | 0 | (1,233,882) | 0 | 0 |
| Net Assets, Beginning, Adjusted | (1,535,940) | (2,141,311) | (2,861,591) | (4,731,021) | 0 | (4,579,570) | (5,527,735) | (6,761,617) | 0 | 0 |
| Net Assets, End | (2,141,311) | (2,861,591) | (4,779,132) | (6,761,617) | 0 | (3,375,820) | (4,457,558) | (5,562,024) | 0 | 0 |



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/29/2020**FISCAL OPERATIONS****RATING**

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

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

Palisades Charter High School's (PCHS) fiscal condition is positive and the school has had positive operational net assets for the past four years (i.e., Fiscal Years 2015-2016 through 2018-2019). According to the 2018-2019 independent audit report, the school had negative net assets of **(\$6,761,617)** and a net loss of **(\$2,030,596)** when factoring in the school's obligation for Other Post-Employment Benefits (OPEB) and the related accrued expenses, as required by Accounting Standards Codification 715 (ASC 715). When excluding the school's actuarial OPEB liability and related expenses, the school had positive operational net assets of \$9,424,466 and a net loss of **(\$795,965)**. The 2019-2020 Second Interim projects negative net assets of **(\$5,562,024)**, including the accrued OPEB obligation and related expenses, and net income of \$1,199,593 (excluding OPEB). When excluding the OPEB liability and related expenses, the school projects positive operational assets of \$10,624,059 and net income of \$1,199,593.

Areas of Demonstrated Strength and/or Progress:

- The school's fiscal condition is positive (when excluding the school's actuarial OPEB liability and the related expenses).

| | 2015-2016 (Audited Actuals) | 2016-2017 (Audited Actuals) | 2017-2018 (Audited Actuals) | 2018-2019 (Audited Actuals) | 2019-2020 (Second Interim) |
|---|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|----------------------------------|
| Net Assets (Excluding OPEB Obligations) | \$10,458,598 | \$10,975,320 | \$10,220,431 | \$9,424,466 | \$10,624,059 |
| Net Income/Loss (excluding OPEB accrued expenses) | \$1,154,383 | \$516,722 | (\$754,889) | (\$795,965) | \$1,199,593 |
| Transfers In/Out | \$0 | \$0 | \$0 | \$0 | \$0 |
| Net Income Adjustment (OPEB related)** | (\$1,231,177) | (\$1,288) | \$0 | \$0 | \$0 |
| OPEB/Prior Year Adjustment(s)*** | (\$1,759,754) | (\$1,237,002) | (\$1,162,652) | (\$1,234,631) | \$0 |
| ASB Adjustment(s)* | (\$9,012) | \$0 | \$0 | \$0 | \$0 |



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*For Fiscal Year 2014-2015, Associated Student Body (ASB) funds are included in the consolidated net asset amount reported above. Beginning in Fiscal Year 2015-2016, the consolidated net asset balances do not include the ASB fund balances.

**These figures represent an adjustment to the net income/ loss balance due to OPEB not captured in the previous Annual Performance-Based Oversight Visit Report.

*** According to the 2018-2019 independent audit report, as of June 30, 2019, the school's accumulated post-retirement benefit obligation is estimated at \$19,698,581. Per Financial Accounting Standards Board Accounting Standards Codification 715 (FASB ASC 715), this long-term obligation is required to be reported as a liability on the school's balance sheet (beginning in Fiscal Year 2014-2015). Per the Fiscal Year 2018-2019 independent audit report, the school's accrued OPEB expense for 2018-2019 was \$1,234,631.

Palisades Charter High established and maintains a special reserve fund for postemployment benefits with Los Angeles County Office of Education (LACOE). Per the school's 2018-2019 independent audit report, as of June 30, 2019, the value of its OPEB funds on deposit with LACOE totaled approximately \$5.2M, which exceeds the estimated expected retiree payments (mainly the actual pay-as-you-go costs) over the next 7 years (i.e., FY 2020-2021 through FY 2027-2028 timeframe) of approximately \$4.5M (as per the June 30, 2018 actuarial valuation report for the retiree health program). Additionally, per the school's 2018-2019 independent audit report, the school designated approximately \$2.2M in net assets to be used to meet OPEB obligations for the school's post-retirement health plan.

Areas Noted for Further Growth and/or Improvement:

1. Lack of Supporting Documentation for Credit Card Purchase:

Based on the CSD's review of the school's credit card statements and a sample of transactions for the period spanning from October 2019 through March 2020, the CSD noted a charge on the December credit card statement that did not include supporting documentation. The credit card purchase in question was a charge for Calendly, made on 12/14/2019 in the amount of \$576.00.

Page 18 of the school's fiscal policies and procedures states that, for credit card purchases, a purchase order request form must be completed and approved by an Administrator, and original receipts and packing slips must be submitted to the finance office. The finance office will attach receipts to purchase orders and will reconcile credit card statements to purchase orders.

The school responded that they are in the process of requesting the supporting documentation from the school employee who requested this purchase.

The CSD recommends that the organization ensure adherence to its governing board-approved fiscal policies and procedures regarding school credit card purchases and maintaining supporting documentation for all purchases made.



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DATE OF VISIT: 4/29/2020**2. Check Outstanding for 90 Days or More:**

Based on the CSD's review of the school's Bank Reconciliation Reports, the CSD noted 18 checks drawn on the school's Associated Student Body (ASB) Account (Ending in X6842), that, as of December 2019, had been outstanding for 180 days or more. Details regarding these checks are summarized below.

| Item # | ASB Account # Ending in | Check # | Date | Amount | Payee | # Of Days Outstanding As of 12/31/2019 |
|--------|-------------------------|---------|--------------|-------------------|-----------------------|--|
| 1 | X6842 | 12375 | 1/15/2019 | \$450.00 | Sage Hill High School | 350 |
| 2 | X6842 | 12437 | 2/4/2019 | \$131.37 | M. S. | 330 |
| 3 | X6842 | 12539 | 2/25/2019 | \$35.00 | K. K. | 309 |
| 4 | X6842 | 12558 | 2/28/2019 | \$80.00 | D. B. | 306 |
| 5 | X6842 | 12637 | 3/18/2019 | \$31.63 | S. S. | 288 |
| 6 | X6842 | 12639 | 3/18/2019 | \$824.89 | B. K. | 288 |
| 7 | X6842 | 12703 | 3/28/2019 | \$14.40 | T. B. | 278 |
| 8 | X6842 | 12704 | 3/28/2019 | \$8.00 | J. S. | 278 |
| 9 | X6842 | 12756 | 4/10/2019 | \$153.77 | C. C. | 265 |
| 10 | X6842 | 12770 | 4/11/2019 | \$1,337.75 | C. S. | 264 |
| 11 | X6842 | 12781 | 4/22/2019 | \$12.00 | E. D. | 253 |
| 12 | X6842 | 12825 | 5/1/2019 | \$233.52 | E. S. | 244 |
| 13 | X6842 | 12944 | 6/5/2019 | \$385.00 | R. M. | 209 |
| 14 | X6842 | 12978 | 6/7/2019 | \$698.00 | M. S. | 207 |
| 15 | X6842 | 12986 | 6/24/2019 | \$13.60 | D. S. | 190 |
| 16 | X6842 | 12994 | 6/24/2019 | \$16.00 | A. W. | 190 |
| 17 | X6842 | 12995 | 6/24/2019 | \$16.00 | J. A. | 190 |
| 18 | X6842 | 13001 | 6/25/2019 | \$12.00 | S. A. M. | 189 |
| | | | Total | \$4,452.93 | | |

Page 29 of the school's fiscal policy manual indicates that, under normal conditions, the general policy for reissuing a payroll check is 10 business days. The procedures for reissuing stale dated, lost, or destroyed payroll and reimbursement checks are outlined below.



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DATE OF VISIT: 4/29/2020

Steps:

Employee or Claimant

1. Complete the Check Cancellation Request/Stop Payment form.
2. Provide original stale dated check (if lost, please indicate on the form check was lost).
3. Submit to Payroll in person.

Payroll (for Employees)/Finance Office (for Claimant)

1. Verifies documents for accuracy (1-2 days).
2. Verifies original check has not been cashed and issues cancellation (1-6 days).
3. Reissues new payment (1-2 days).
4. Distributes check to claimant via method requested.

Stop Payment Fee

If a check was re-issued due to a lost check, a stop payment will be placed. The employee (or claimant) will be assessed the current bank fee of \$30.

Distribute Replacement Check

After the replacement check has been issued, employee or claimant will be contacted for pick up. If the claimant is not employed by Palisades Charter High School, check will be mailed.”

According to the school, its bank processes checks presented for payment with issuance dates exceed 180 days and only raises concerns when checks are presented that reflect issuance dates that are more than 365 days prior.

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

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



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

1. Delinquency Charges on Credit Cards:

Based on the CSD's review of the school's credit card statements for the period spanning from January 2019 through March 2019, the CSD noted credit card statements that referenced late fees and finance charges. Details regarding these statements are provided below.

| Item # | Account # Ending in | Statement Closing Date | Late Fees | Finance Charges |
|--------|------------------------|------------------------|----------------|-----------------|
| 1 | X5620 | 10/31/2019 | \$0.00 | \$18.75 |
| 2 | X5620 | 11/30/2019 | \$39.00 | \$12.23 |
| 3 | X5620 | 12/31/2019 | \$39.00 | \$81.45 |
| | | TOTALS | \$78.00 | \$112.43 |

According to the school, effective January 2020, the credit card account referenced above was closed. The school moved its school credit cards to a different financial institution with terms more favorable to the school. Consequently, the school anticipates no additional delinquency charges on its school credit cards in the future.

The CSD notes that there no late fees or interest charges were reflected in the school's credit card statements from January 2020 through March 2020.

The Charter Schools Division will review the recommended updates to the school's fiscal policies by 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 noted in this report.



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1. Reviewed independent audit report for the fiscal year ended June 30, 2019 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: None Reported
2. Reviewed bank statements and bank reconciliations from August 2019 through January 2020. Selected the months of December 2019 and January 2020 for sample testing. Discrepancies were noted under Area for Further Growth and/or Improvement above.
 - a. Cathay Bank Checking Account Ending in X6940 (Operating Account)
 - b. Cathay Bank Checking Account Ending in X0440 (Transportation Account)
 - c. Cathay Bank Checking Account Ending in X6850 (Cafeteria Account)
 - d. Cathay Bank Checking Account Ending in X6842 (Associated Student Body Account)
 - e. Cathay Bank Checking Account Ending in X6869 (Drama Account)
 - f. Cathay Bank Checking Account Ending in X6877 (Permit Account)
 - g. Cathay Bank Checking Account Ending in X6885 (Fundraising Account)
 - h. Cathay Bank Checking Account Ending in X6893 (Education Fund Account)
 - i. Cathay Bank Checking Account Ending in X6923 (Pool Account)
 - j. Cathay Bank Checking Account Ending in X6931 (Payroll Account)
 - k. Cathay Bank Checking Account Ending in X6958 (Scholarship Account)
- a. Reviewed credit card statements from October 2019 through March 2020. Selected the months of December 2019 through February 2020 for sample testing. Discrepancies were noted under Area for Further Growth and/or Improvement above.
 - a. First National Bank of Omaha Credit Card Ending in X5620 (Executive Director/School Principal, account closed in December 2019)
 - b. First National Bank of Omaha Credit Card Ending in X4535 (Chief Business Officer, account closed in December 2019)
 - c. US Bank Credit Card Ending in X3039 (Executive Director/ School Principal, account opened in January 2020)
 - d. US Bank Credit Card Ending in X4868 (Chief Business Officer, account opened in January 2020)
- b. Reviewed the following 20 checks. No discrepancies were noted.
 - a. Check numbers: 13242, 13615, 13646, 20044134, 20045955, 20049484, 20058090, 20058835, 20060047, 20061891, 20068941, 20072047, 20073687, 20074332, 20076648, 20080368, 20080921, 20081438, 20081872, and 30000002
3. Per the 2018-2019 audit report, the school's cash and cash equivalents is \$6,260,266 and total expenditures equal \$39,284,013. Therefore, the school's cash reserve level is 15.94%, which exceeds the recommended 5%.
4. A copy of the charter school's organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee with responsibilities outlined within the charter school's financial policies and procedures was provided.
5. A Segregation of Duties (SOD) review was conducted remotely with Palisades Charter High (via videoconference). No discrepancies were noted.
6. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
7. Reviewed student body financial records from July 2019 through December 2019. No discrepancies were noted.



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8. Pursuant to AB 1871, a signed written statement that indicates that Palisades Charter High is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
9. Palisades Charter High did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
10. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
11. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
12. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
13. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
14. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
15. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
16. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
17. Evidence of Palisades Charter High offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
18. Equipment inventory was provided.
19. The 2019-2020 LCAP was submitted to LAUSD.
20. The most current LCAP is posted on the charter school's website.
21. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school's website.
22. The most current Audited Financial Statements are posted on the charter school's website.
23. The 2018-2019 audited and unaudited actuals do not mirror each other. The audited actuals reflect expenditures that are \$1.2M higher than the amounts reflected in the school's unaudited actuals. The school attributed this variance primarily to accrued expenditures related to its long-term OPEB obligations.

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

N/A



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Fiscal Operations Rubrics

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

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

| | |
|--|--|
| <p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p> | <p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p> |
| <p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; | <p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; |



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



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| <p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p> | <p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p> |
| <p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> | <p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> |

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| <p><i>An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.</i></p> | <p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p> |
| <p><u>Existing Schools (based on the most current audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond); 2. The cash balance at the beginning of the school year is positive; 3. Vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Governing board adopts the annual budget; 6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871); 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; | <p><u>Existing Schools (based on the most current audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p> |



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| <p><i>An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.</i></p> | <p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p> |
| <p>8. The LCAP is submitted to the appropriate agencies; 9. Have an audit conducted annually by an independent auditing firm; and 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities); 2. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; 3. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting; 4. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 5. Current audit shows no material weaknesses, deficiencies and/or findings; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. There is no apparent conflict of interest; and 8. Governing board approves any amendment(s) to the charter school's budget. <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> | <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> |



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



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| <p><i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i></p> | <p><i>A new school would be assessed as Unsatisfactory based on the statements below:</i></p> |
| <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> | <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> |

Coversheet

Special Education Plan

Section: IV. Academic Excellence
Item: A. Special Education Plan
Purpose: FYI
Submitted by:
Related Material: ELA Participation Rate 9_18_2019.pdf
ELA Performance 9_18_2019.pdf
GRAD Rate 9_12_2020.pdf
Math Participation Rate 9_18_2019.pdf
Rev. Math Performance 9_18_2019.pdf

Local Educational Agency Name:

Palisades Charter High School

2019–20 Special Education Plan

Element 3b: English Language Arts Participation

Element 3b: English Language Arts (ELA) Participation, corresponds to State Performance Plan Indicator (SPPI) 3b: ELA Participation. The Local Educational Agency (LEA) must address this Element in its 2019–20 Special Education Plan (SEP) if the LEA did not meet the statewide target for SPPI 3b: ELA Participation, as shown on the LEA’s Annual Performance Report (APR) and on the *2019–20 Targeted Review Selection Data* chart linked to the January 31, 2020, *Annual Determination Notification*.

Note: The selection process for this Element may vary somewhat from the above, such as for LEAs designated as “smalls.” The California Department of Education (CDE) distributed a checklist document in June 2020 entitled *Elements Requiring Review 2019–20 Monitoring Year (Elements Requiring Review)*. The LEA must address in its 2019–20 SEP every Element for which the *Elements Requiring Review* list shows “Yes” in the Review Required column.

I. Review of APR Data

SPPI 3b: ELA Participation has a target of 95 percent of students with disabilities participating in the ELA portion of the California Assessment of Student Performance and Progress (CAASPP) or the California Alternate Assessment (CAA), as shown on the APR.

Using the LEA’s APR data, complete the chart below for Element 3b: ELA Participation.

What is the ELA Participation rate (Rate) of students with disabilities?

| LEA’s ELA Participation Rate | State Target |
|------------------------------|--------------|
| 94.55% | 95% |

II. Current Improvement Strategies

Describe and discuss current or recent improvement strategies, relevant to this Element, that the LEA implemented prior to the development of this SEP. For example: Did the strategies result in improved outcomes for students with disabilities? How is improvement measured? Did the LEA address this area in a 2018–19 Performance Indicator Review (PIR) Plan?

Targeted test date for special education students resulted in 3 students who did not participate in the ELS test. Dashboard results indicate 95% participation rate which meets target. APR results show 94.55% participation rate which falls below state target.

III. Data and Analysis

In order to identify appropriate root causes for the LEA's performance in relation to Element 3b: ELA Participation, the LEA should examine formal and informal data to understand the factors contributing to the challenges the LEA is experiencing. The Data Source Checklist, below, should guide the SEP Team in next steps, but the range of data review is within the discretion of the SEP Team.

Data Source Checklist

Identify data sources the SEP Team will use in developing the LEA's 2019–20 SEP for Element 3b: ELA Participation. Analyze the selected data sources to find connections/relationships between the data and the LEA's performance.

| Data Sources | Check if Using |
|--|----------------|
| California School Dashboard | X |
| California School Dashboard – Comparison to All Students or Other Student Groups | |
| Annual Performance Report – ELA Participation Rate | X |
| Special Education Information Systems (e.g., SEIS, SIRAS, Welligent) | |
| Attendance Records, Discipline Data | X |
| CAASPP Makeup Records | |
| California Longitudinal Pupil Achievement Data System (CALPADS) | |

| Data Sources | Check if Using |
|--|----------------|
| Test Operations Management System (TOMS) Records, Student Score Reports, Accommodations | |
| IEP Meeting Notes, Parent Opt-Out letters, Testing Accommodations | |
| Policies and Procedures | |
| Compliance Review Data (Student Record Reviews, SELPA Governance Review, Policies and Procedures Review) | |
| Parent Input Data | |
| Other School Plans (e.g., Local Control Accountability Plan (LCAP), Western Association of Schools and Colleges (WASC), Technology Plan) | |
| Other (please state): | |

IV. Additional Factors Affecting Performance

Are there any other factors, internal and/or external, that the SEP Team should consider when evaluating performance for this Element? List in the box below. For example, do the systems, policies, procedures, and/or practices address this Element for students with disabilities, and are they working as intended?

V. Root Cause Analysis and Improvement

Complete the boxes and charts below. In the Root Cause box, identify a root cause for the LEA’s performance level specific to Element 3b: ELA Participation. In the Data Support box, include an explanation of the data and any background information needed for the root cause to be understandable to someone outside the LEA. In the Phase 1 chart, identify the strategies/activities that will address the root cause and provide the required details regarding implementation. In the Phase 2 chart, provide the required details regarding monitoring. In the last chart, list documentation that the LEA intends to keep regarding implementation and monitoring.

If the LEA completed a 2018–19 PIR Plan, the LEA may consider including root causes from the PIR Plan in the LEA’s 2019–20 SEP if the root cause is still an issue based on analysis of the LEA’s current data.

Note: The boxes and charts below apply to one, and only one, root cause. Copy and complete a new set of boxes and charts for each additional root cause, if any.

Root Cause:

Student absences due to physical or psychiatric issues and/or parent desire to opt out of testing resulted in 3 students who did not test.

Data Support and Background for Root Cause:

Parent Opt out & attendance reports.

| Phase 1: Improvement Strategy Development | |
|---|--|
| Strategies/Activities for Improvement <i>List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.</i> | |
| 1. | Educate parents on impact of opting out of state testing. |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Resources Required <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Dedicated staff time to educate parents. |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Title of Person(s) Responsible for Implementation <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Administrator of Special Education |
| 2. | Sp Ed Case Carriers |
| 3. | |
| 4. | |
| 5. | |
| Start Date <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 1/14/2021 |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Date of Completion <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 6/1/2021 |
| 2. | |
| 3. | |

| | |
|---|--|
| 4. | |
| 5. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | Increase in participation by 1% of students |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | CA Dashboard Participation Rate |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | 95% Participation Rate |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

Documentation of Implementation

Each LEA is required to keep documentation on the implementation and monitoring of the SEP. The documentation should be a record of the strategies/activities and the results of the implementation of the strategies/activities.

The documentation should include the following:

1. Evidence the SEP meetings and strategies/activities have occurred (e.g., agendas, sign in sheets, meeting notes, slide presentations).
2. Indication of changes that have occurred as a result of the strategies/activities (e.g., copy of revised policies and procedures, new tracking mechanisms).
3. Evidence that the SEP Team has monitored the implementation of its plan.
4. Demonstration of the preliminary results of strategies/activities (e.g., surveys, observation notes).

5. Evidence of quantifiable measurement of success, if any (e.g., increasing classroom assessment scores, before-and-after data charts).

List the documentation the SEP Team intends to keep on the above-stated implementation and monitoring activities related to this root cause.

| |
|--|
| SEP Committee Agenda & Meeting Sign In |
|--|

Copy and complete the above charts for each additional root cause.

VI. Placement of Forms in the SEP PDF

Place each required *Element Form* in numerical order (or alphabetical order thereafter for unnumbered Elements) after the *LEA Identification Form*. Save as one PDF document. If the LEA uses separate *Root Cause Analysis and Improvement Forms*, the placement of those forms should be directly after the corresponding *Element Form*.

Title the single PDF SEP document with the following naming convention: <Name of LEA><SELPA> 2019–20 SEP-<Targeted or Intensive>.

Prepared by the California Department of Education, July 22, 2020.

Local Educational Agency Name:

Palisades Charter High School

2019–20 Special Education Plan

Element 3c: English Language Arts Achievement

Element 3c: English Language Arts (ELA) Achievement, corresponds to academic performance in ELA as shown on the California School Dashboard (Dashboard) for students with disabilities, and to State Performance Plan Indicator (SPPI) 3c: ELA Achievement as shown on the Annual Performance Report (APR). The California Department of Education (CDE) distributed a checklist document in June 2020 entitled *Elements Requiring Review 2019–20 Monitoring Year (Elements Requiring Review)*. The Local Educational Agency (LEA) must address this Element in its 2019–20 SEP if the *Elements Requiring Review* list shows “Yes” for this Element in the Review Required column.

I. Review of Dashboard and APR Information/Data

The 2019 Dashboard method for calculating ELA Achievement differs from the method used for the SPPI 3c: ELA Achievement calculation on the APR. The Dashboard calculations reflect the Distance from Standard, which is the measurement of how many points, on average, students are from the lowest possible score for Standard Met. Each of those calculations differs from the SPPI 3c calculation method on the APR report. The APR calculation reflects the number of students with disabilities scoring at or above the standard divided by the total number of students with disabilities who received a valid score and for whom a proficiency level was assigned. Each method of calculation is used in determining whether the LEA is in the Targeted or the Intensive Review, and both are valid for understanding the LEA’s performance on the ELA portion of the California Assessment of Student Performance and Progress (CAASPP) and the California Alternate Assessment (CAA).

A. Review of Dashboard Information/Data

The LEA’s performance level for ELA achievement on the Dashboard is a combination of Status Level and Change Level. The SEP Team’s understanding of the Dashboard data and performance levels will be essential in the team’s determination of root causes and corresponding strategies/activities. The SEP Team may determine root causes applicable to the Status Level, Change Level, or both depending on the LEA’s Dashboard data.

Using the data on the 5x5 English Language Arts Placement Report (Grades 3-8 and 11)–Detailed Data from the LEA’s 2019 California School Dashboard, complete the charts below with information for the student group: Students with Disabilities.

| Color | Status Level | Change Level | CURRENT STATUS: Average distance from Standard | CHANGE: Difference between current status and prior status |
|--------|--------------|--------------|---|---|
| Orange | Low | Declined | -44.9 | -4 |

Based on the above information, indicate the area(s) the LEA intends to address.

| Area to Address | Yes or No |
|-----------------|-----------|
| Status Level | Yes |
| Change Level | Yes |

B. Review of APR Data

Using the SSPI data from the LEA’s APR, complete the chart below for 3c: ELA Achievement.

| LEA’s Rate | State Target |
|------------|--------------|
| 32.69% | >15.9% |

Once the LEA has determined the LEA’s performance level on the Dashboard and the APR in ELA Achievement, complete the chart below.

| Accountability System | Performance Level to Meet Requirements | Did the LEA Meet the Performance Level? |
|-----------------------|--|---|
| Dashboard | Blue, Green or Yellow | No |
| APR | >15.9% | Yes |

II. Current Improvement Strategies

Describe and discuss current or recent improvement strategies relevant to this Element that the LEA implemented prior to the development of this SEP. For example: Did the strategies result in improved outcomes for students with disabilities? How is improvement measured? Did the LEA address this area in a 2018–19 Performance Indicator Review (PIR) Plan?

This area was addressed in the PIR Plan with an emphasis on providing instruction and practice embedding critical reasoning within the writing process. While we did not meet growth within the performance level requirement on the CDE School Dashboard, we did exceed the state target for the APR Accountability System. We will continue current strategies to facilitate student growth in this area.

III. Data and Analysis

In order to identify appropriate root causes for the LEA’s performance in relation to Element 3c: ELA Achievement, the LEA should examine formal and informal data to understand the factors contributing to the challenges the LEA is experiencing. The *Data Source Checklist* below should guide the SEP Team in next steps, but the range of data review is within the discretion of the SEP Team.

Data Source Checklist

Identify data sources the SEP Team will use in developing the LEA’s 2019–20 SEP for Element 3c: ELA Achievement. Analyze the selected data sources to find connections/relationships between the data and the LEA’s performance.

| Data Sources | Check if Using |
|---|----------------|
| California School Dashboard— ELA for Student with Disabilities | X |
| California School Dashboard— Comparison to All Students or Other Student Groups | |
| Test Operations Management System (TOMS) Student Score Reports | |
| Test Operations Management System (TOMS) Accommodations | |

| Data Sources | Check if Using |
|--|----------------|
| Interim or Other Assessments | |
| Classroom-level Data— Student Grades, Assignment Grades | |
| Annual Performance Report (APR) – ELA Achievement, Participation Rate, Least Restrictive Environment (LRE) | X |
| Special Education Information System (e.g., SEIS, Welligent, SIRAS) | |
| Service Logs and/or Pull-Out Schedules | |
| Student Course Enrollment Data, Attendance Records, Schedules, and/or Transcripts | |
| California Longitudinal Pupil Achievement Data System (CALPADS) | |
| Empathy Interview/ Focus Group Data | |
| Observation of English class(es) | |
| Observation of Testing (CAASPP or Other Testing Environment) | |
| Professional Development Records | |
| Curriculum Guides, Lesson Plans, Syllabi | |
| Other School Plans (e.g., Local Control Accountability Plan (LCAP), Western Association of Schools and Colleges (WASC), Technology Plan) | |
| Policies and Procedures | |
| Compliance Review Data (Student Record Reviews, SELPA Governance Review, Policies and Procedures Review) | |
| Parent Input Data | |
| Other (please state): | |

IV. Additional Factors Affecting Performance

Are there any other factors, internal and/or external, that the SEP Team should consider when evaluating performance for this Element? List in the box below. For example, do

Element 3c: ELA Achievement
2019–20 SEP
Page 4

the systems, policies, procedures, and/or practices address this Element for students with disabilities, and are they working as intended?

V. Root Cause Analysis and Improvement

Complete the boxes and charts below. In the Root Cause box, identify a root cause for the LEA's performance level specific to Element 3c: ELA Achievement. In the Data Support box, include an explanation of the data and any background information needed for the root cause to be understandable to someone outside the LEA. In the Phase 1 chart, identify the strategies/activities that will address the root cause and provide the required details regarding implementation. In the Phase 2 chart, provide the required details regarding monitoring. In the last chart, list documentation that the LEA intends to keep regarding implementation and monitoring.

If the LEA completed a 2018–19 PIR Plan, the LEA may consider including root causes from the PIR Plan in the LEA's 2019–20 SEP if the root cause is still an issue based on analysis of the LEA's current data.

Note: The boxes and charts below apply to one, and only one, root cause. Copy and complete a new set of boxes and charts for each additional root cause, if any.

Root Cause:

Instruction did not focus on CAASPP format and provide practice on embedding critical reasoning within the writing process.

Data Support and Background for Root Cause:

Breakdown of CAASPP ELA Categories, CDE School Dashboard and APR data/

| Phase 1: Improvement Strategy Development | |
|--|--|
| Strategies/Activities for Improvement <i>List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.)</i> | |
| 1. | Utilize writing strategies to increase familiarity and performance on CAASPP ELA tasks. |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Resources Required <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Teacher Prep Time / collaboration between gen ed and sp ed teachers |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Title of Person(s) Responsible for Implementation <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Administrator over English & Special Ed |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Start Date <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 3/2019 - Continued |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Date of Completion <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 6/1/2021 |
| 2. | |

| | |
|---|--|
| 3. | |
| 4. | |
| 5. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | Increased Change Level on CDE Dashboard |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | CDE Dashboard ELA results |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | Distance from Standard <u>< 40</u> |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

Documentation of Implementation

Each LEA is required to keep documentation on the implementation and monitoring of the SEP. The documentation should be a record of the strategies/activities and the results of the implementation of the strategies/activities.

The documentation should include the following:

1. Evidence the SEP meetings and strategies/activities have occurred (e.g., agendas, sign in sheets, meeting notes, slide presentations).
2. Indication of changes that have occurred as a result of the strategies/activities (e.g., copy of revised policies and procedures, new tracking mechanisms).
3. Evidence that the SEP Team has monitored the implementation of its plan.
4. Demonstration of the preliminary results of strategies/activities (e.g., surveys, observation notes).

5. Evidence of quantifiable measurement of success, if any (e.g., increasing classroom assessment scores, before-and-after data charts).

List the documentation the SEP Team intends to keep on the above-stated implementation and monitoring activities related to this root cause.

SEP Meeting Agenda and Sign-In

Copy and complete the above charts for each additional root cause.

VI. Placement of Forms in the SEP PDF

Place each required *Element Form* in numerical order (or alphabetical order thereafter for unnumbered Elements) after the *LEA Identification Form*. Save as one PDF document. If the LEA uses separate *Root Cause Analysis and Improvement Forms*, the placement of those forms should be directly after the corresponding *Element Form*.

Title the single PDF SEP document with the following naming convention: <Name of LEA><SELPA> 2019–20 SEP-<Targeted or Intensive>.

Prepared by the California Department of Education, July 22, 2020.

Local Educational Agency Name:

Palisades Charter High School

2019–20 Special Education Plan

Element 1: Graduation Rate

Element 1: Graduation Rate corresponds to Graduation Rate as shown on the California School Dashboard (Dashboard) for students with disabilities. If the Local Educational Agency's (LEA's) 2019 Dashboard performance level for Graduation Rate for students with disabilities is red or orange, the LEA must address this Element in its Special Education Plan (SEP), for implementation beginning in the 2020–21 school year.

Note: The selection process for this Element may vary somewhat from the above, such as for LEAs designated as “smalls.” The California Department of Education (CDE) distributed a checklist document in June 2020 entitled *Elements Requiring Review 2019–20 Monitoring Year (Elements Requiring Review)*. The LEA must address in its 2019–20 SEP every Element for which the *Elements Requiring Review* list shows “Yes” in the Review Required column.

I. Review of Dashboard Information/Data

The LEA's performance level for Graduation Rate on the Dashboard is a combination of Status Level and Change Level. In July 2019, the State Board of Education approved the implementation of a combined graduation rate, which reflects all students who: (1) graduate in four years as part of the most current graduating class and (2) graduate in five years as part of the prior year graduating class. Beginning with the Fall 2019 Dashboard, the Graduation Rate on the Dashboard, for all comprehensive high schools, is based on the combined rate. [See the *California Department of Education's 2019 California School Dashboard Technical Guide: Final Version 2019–20 School Year, December 2019*.] The SEP Team's understanding of the Dashboard data and performance levels will be essential in the team's determination of root causes and corresponding strategies/activities to improve performance. The SEP Team may determine root causes applicable to the Status Level, Change Level, or both, depending on the LEA's Dashboard data.

Using data for the Student Group: Students with Disabilities on the 5x5 Graduation Rate Placement Report–Detailed Data from the LEA's 2019 Dashboard, complete the charts below.

| Color | Status Level | Change Level | CURRENT STATUS: 2018–19 Graduation Rate | CHANGE: Difference between current rate and prior rate |
|--------|--------------|--------------|---|--|
| Orange | Medium | Declined | 90.1% | -3.1% |

Based on the above information, indicate the area(s) that the LEA intends to address:

| Area to Address | Yes/No |
|-----------------|--------|
| Status Level | Yes |
| Change Level | Yes |

II. Current Improvement Strategies

Describe and discuss current or recent improvement strategies, relevant to this Element, that the LEA implemented prior to the development of this SEP. For example: Did the strategies result in improved outcomes for students with disabilities? How is improvement measured? Did the LEA address this area in a 2018–19 Performance Indicator Review (PIR) Plan?

This area was not addressed in 2018-19 PIR.

III. Data and Analysis

In order to identify appropriate root causes for the LEA's performance in relation to Element 1: Graduation Rate, the LEA should examine formal and informal data to understand the factors contributing to the challenges the LEA is experiencing. The *Data Source Checklist*, below, should guide the SEP Team in next steps, but the range of data review is within the discretion of the SEP Team.

Data Source Checklist

Identify data sources the SEP Team will use in developing the LEA's 2019–20 SEP for Element 1: Graduation Rate. Analyze the selected data sources to find connections/relationships between the data and the LEA's performance.

| Data Sources | Check if Using |
|---|----------------|
| California School Dashboard | X |
| Ed-data.org—Cohort Graduation | |
| California Longitudinal Pupil Achievement Data System (CALPADS) | |
| Annual Performance Report (APR) | |
| Special Education Information System (e.g., SEIS, SIRAS, Welligent) | X |
| UC/CSU eligibility/enrollment data | |
| Transition Plans | |
| Student Grades, Transcripts | X |
| Guidance Counselor Information | X |
| Other School Plans (e.g., Local Control Accountability Plan (LCAP), Western Association of Schools and Colleges (WASC), Technology Plan | |
| Policies and Procedures | |
| Compliance Review Data (Student Record Reviews, SELPA Governance, Policies and Procedures) | |
| Parent Input Data | |
| Other (please state): | |

IV. Additional Factors Affecting Performance

Are there any other factors, internal and/or external, that the SEP Team should consider when evaluating performance for this Element? List in the box below. For example, do systems, policies, procedures, and/or practices address this Element for students with disabilities, and are they working as intended?

Examine reporting procedures when students are hospitalized / privately placed as 3 students were in psychiatric facilities and should have been withdrawn. One student was placed in NPS but remained enrolled for ADA.

V. Root Cause Analysis and Improvement

Complete the boxes and charts below. In the Root Cause box, identify a root cause for the LEA's performance level specific to Element 1: Graduation Rate. In the Data Support box, include an explanation of the data and any background information needed for the root cause to be understandable to someone outside the LEA. In the Phase 1 chart, identify the strategies/activities that will address the root cause and provide the required details regarding implementation. In the Phase 2 chart, provide the required details regarding monitoring. In the last chart, list documentation that the LEA intends to keep regarding implementation and monitoring.

If the LEA completed a 2018–19 PIR Plan, the LEA may consider including root causes from the PIR Plan in the LEA's 2019–20 SEP if the root cause is still an issue based on analysis of the LEA's current data.

Note: The boxes and charts below apply to one, and only one, root cause. Copy and complete a new set of boxes and charts for each additional root cause, if any.

Root Cause:

Students entering private placements are not checked out appropriately.

Data Support and Background for Root Cause:

3 of 8 students were in psychiatric hospitalization at the end of 18-19 school year but remained as active students.

1 of 8 was placed by PCHS in a non-public school and graduated on time but graduation was not reflected in SIS.

| Phase 1: Improvement Strategy Development | |
|--|---|
| Strategies/Activities for Improvement (List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.) | |
| 1. | Review withdraw procedures |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Resources Required (Align numbers with Strategies/Activities for Improvement) | |
| 1. | Internal staff |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Title of Person(s) Responsible for Implementation (Align numbers with Strategies/Activities for Improvement) | |
| 1. | Asst. Principal, Student Support |
| 2. | Asst. Principal, Attendance & Admissions |
| 3. | |
| 4. | |
| 5. | |
| Start Date (Align numbers with Strategies/Activities for Improvement) | |
| 1. | 12/1/2020 |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Date of Completion (Align numbers with Strategies/Activities for Improvement) | |
| 1. | 12/1/2021 |
| 2. | |
| 3. | |
| 4. | |

| | |
|--|--|
| 5. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement) | |
| 1. | Grad. Rate Target met. |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement) | |
| 1. | Grad Rate – CDE Dashboard |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement) | |
| 1. | Grad Rate \geq 93% |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

Documentation of Implementation

Each LEA is required to keep documentation on the implementation and monitoring of the SEP. The documentation should be a record of the strategies/activities and the results of the implementation of the strategies/activities.

The documentation should include the following:

1. Evidence the SEP meetings and strategies/activities have occurred (e.g., agendas, sign in sheets, meeting notes, slide presentations).
2. Indication of changes that have occurred as a result of the strategies/activities (e.g., copy of revised policies and procedures, new tracking mechanisms).
3. Evidence that the SEP Team has monitored the implementation of its plan.
4. Demonstration of the preliminary results of strategies/activities (e.g., surveys, observation notes).
5. Evidence of quantifiable measurement of success, if any (e.g., increasing classroom assessment scores, before-and-after data charts).

List the documentation the SEP Team intends to keep on the above-stated implementation and monitoring activities related to this root cause.

Monitoring withdrawals in SIS for accurate reporting. Maintain copies of completed withdrawal forms,

Copy and complete the above charts for each additional root cause.

VI. Placement of Forms in the SEP PDF

Place each required *Element Form* in numerical order (or alphabetical order thereafter for unnumbered Elements) after the *LEA Identification Form*. Save as one PDF document. If the LEA uses separate *Root Cause Analysis and Improvement Forms*, the placement of those forms should be directly after the corresponding *Element Form*.

Title the single PDF SEP document with the following naming convention: <Name of LEA><SELPA> 2019–20 SEP-<Targeted or Intensive>.

Prepared by the California Department of Education, July 22, 2020.

Element 1: Graduation Rate
2019–20 SEP
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Local Educational Agency Name:

Palisades Charter High School

2019–20 Special Education Plan

Element 3b: Math Participation

Element 3b: Math Participation corresponds to State Performance Plan Indicator (SPPI) 3b: Math Participation. The Local Educational Agency (LEA) must address this Element in its 2019–20 Special Education Plan (SEP) if the LEA did not meet the statewide target for SPPI 3b: Math Participation as shown on the LEA’s Annual Performance Report (APR) and on the *2019–20 Targeted Review Selection Data* chart linked to the January 31, 2020, *Annual Determination Notification*.

Note: The selection process for this Element may vary somewhat from the above, such as for LEAs designated as “smalls.” The California Department of Education (CDE) distributed a checklist document in June 2020 entitled *Elements Requiring Review 2019–20 Monitoring Year (Elements Requiring Review)*. The LEA must address in its 2019–20 SEP every Element for which the *Elements Requiring Review* list shows “Yes” in the Review Required column.

I. Review of APR Data

SPPI 3b: Math Participation has a target of 95 percent of students with disabilities participating in the Math portion of the California Assessment of Student Performance and Progress (CAASPP) or the California Alternate Assessment (CAA), as shown on the APR.

Using the LEA’s APR data, fill out the chart below for Element 3b: Math Participation.

What is the Math Participation rate (Rate) of students with disabilities?

| LEA’s Math Participation Rate | State Target |
|-------------------------------|--------------|
| 94% | 95% |

II. Current Improvement Strategies

Describe and discuss current or recent improvement strategies, relevant to this Element, that the LEA implemented prior to the development of this SEP. For example: Did the strategies result in improved outcomes for students with disabilities? How is improvement measured? Did the LEA address this area in a 2018–19 Performance Indicator Review (PIR) Plan?

This area was addressed in the 2017-18 PIR for students with disabilities and assessment sessions were scheduled to ensure all SWD were assessed. The participation rate remains at 94% representing only 4 students not assessed. In reviewing attendance records, two of the four students were hospitalized for psychiatric issues, one student's parent opted out of assessment and one student was chronically absent.

III. Data and Analysis

In order to identify appropriate root causes for the LEA's performance in relation to Element 3b: Math Participation, the LEA should examine formal and informal data to understand the factors contributing to the challenges the LEA is experiencing. The Data Source Checklist, below, should guide the SEP Team in next steps, but the range of data review is within the discretion of the SEP Team.

Data Source Checklist

Identify data sources the SEP Team will use in developing the LEA's 2019–20 SEP for Element 3b: Math Participation. Analyze the selected data sources to find connections/relationships between the data and the LEA's performance.

| Data Sources | Check if Using |
|--|----------------|
| California School Dashboard – Math Participation | X |
| California School Dashboard – Comparison to All Students or Other Student Groups | |
| APR – Math Participation Rate | X |
| Special Education Information Systems (e.g., SEIS, SIRAS, Welligent) | |
| Attendance Records, Discipline Data | X |

| Data Sources | Check if Using |
|---|----------------|
| CAASPP Makeup Records | |
| California Longitudinal Pupil Achievement Data System (CALPADS) | |
| Test Operations Management System (TOMS) Records, Student Score Reports, Accommodations | |
| IEP Meeting Notes, Parent Opt-Out letters, Testing Accommodations | |
| Policies and Procedures | |
| Compliance Review Data (Student Record Reviews, SELPA Governance Review, Policies and Procedures Review) | |
| Parent Input Data | |
| Other School Plans, such as the Local Control Accountability Plan (LCAP), Western Association of Schools and Colleges (WASC), Technology Plan | |
| Other (please state): | |

IV. Additional Factors Affecting Performance

Are there any other factors, internal and/or external, that the SEP Team should consider when evaluating performance for this Element? List in the box below. For example, do the systems, policies, procedures, and/or practices address this Element for students with disabilities, and are they working as intended?

There were 4 students who did not participate in Math Assessment due to absences resulting from hospitalization, chronic absenteeism (1) or parent opting out of testing as student had no prior high school experience. PCHS is reviewing it's policy on admissions and attendance to identify practices to withdraw students (with right to return) who are hospitalized or unable to attend school for ≥ 10 days.

V. Root Cause Analysis and Improvement

Complete the boxes and charts below. In the Root Cause box, identify a root cause for the LEA's performance level specific to Element 3b: Math Participation. In the Data Support box, include an explanation of the data and any background information needed for the root cause to be understandable to someone outside the LEA. In the Phase 1 chart, identify the strategies/activities that will address the root cause and provide the required details regarding implementation. In the Phase 2 chart, provide the required details regarding monitoring. In the last chart, list documentation that the LEA intends to keep regarding implementation and monitoring.

If the LEA completed a 2018–19 PIR Plan, the LEA may consider including root causes from the PIR Plan in the LEA's 2019–20 SEP if the root cause is still an issue based on analysis of the LEA's current data.

Note: The boxes and charts below apply to one and only one root cause. Copy and complete a new set of boxes and charts for each additional root cause, if any.

Root Cause:

Students (4) remain enrolled when unable to attend school due to physical or emotional issues..

Data Support and Background for Root Cause:

Student attendance data; CDE APR data

| Phase 1: Improvement Strategy Development | |
|---|---|
| Strategies/Activities for Improvement <i>List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.</i> | |
| 1. | Develop / revise attendance policy |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Resources Required <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Administrative – existing resources. |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Title of Person(s) Responsible for Implementation <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | AP, Admissions & Attendance |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Start Date <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 12/1/2020 |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Date of Completion <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 3/1/2021 |
| 2. | |
| 3. | |
| 4. | |

| | |
|---|---|
| 5. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | 95% CAASPP Participation Rate |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | CDE Dashboard – Mathematics Participation Rate |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | Increase from 94% to 95% rate |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

Documentation of Implementation

Each LEA is required to keep documentation on the implementation and monitoring of the SEP. The documentation should be a record of the strategies/activities and the results of the implementation of the strategies/activities.

The documentation should include the following:

1. Evidence the SEP meetings and strategies/activities have occurred (e.g., agendas, sign in sheets, meeting notes, slide presentations).
2. Indication of changes that have occurred as a result of the strategies/activities (e.g., copy of revised policies and procedures, new tracking mechanisms).
3. Evidence that the SEP Team has monitored the implementation of its plan.
4. Demonstration of the preliminary results of strategies/activities (e.g., surveys, observation notes).
5. Evidence of quantifiable measurement of success, if any (e.g., increasing classroom assessment scores, before-and-after data charts).

Element 3b: Math Participation
2019-20 SEP
Page 6

List the documentation the SEP Team intends to keep on the above-stated implementation and monitoring activities related to this root cause.

Schedule of CAASPP administration / Make up tests
Attendance Policy

Copy and complete the above charts for each additional root cause.

VI. Placement of Forms in the SEP PDF

Place each required *Element Form* in numerical order (or alphabetical order thereafter for unnumbered Elements) after the *LEA Identification Form*. Save as one PDF document. If the LEA uses separate *Root Cause Analysis and Improvement Forms*, the placement of those forms should be directly after the corresponding *Element Form*.

Title the single PDF SEP document with the following naming convention: <Name of LEA><SELPA> 2019-20 SEP-<Targeted or Intensive>.

Prepared by the California Department of Education, July 22, 2020.

Local Educational Agency Name:

2019–20 Special Education Plan

Element 3c: Math Achievement

Element 3c: Math Achievement corresponds to academic performance in Math as shown on the California School Dashboard (Dashboard) for students with disabilities, and to State Performance Plan Indicator (SPPI) 3c: Math Achievement as shown on the Annual Performance Report (APR). The California Department of Education (CDE) distributed a checklist document in June 2020 entitled *Elements Requiring Review 2019–20 Monitoring Year (Elements Requiring Review)*. The Local Educational Agency (LEA) must address this Element in its 2019–20 SEP if the *Elements Requiring Review* list shows “Yes” for this Element in the Review Required column.

I. Review of Dashboard and APR Information/Data

The 2019 Dashboard method for calculating Math Achievement differs from the method used for the SPPI 3c: Math Achievement calculation on the APR. The Dashboard calculations reflect the Distance from Standard, which is the measurement of how many points, on average, students are from the lowest possible score for Standard Met. Each of those calculations differ from the SPPI 3c calculation method on the APR report. The APR calculation reflects the number of students with disabilities scoring at or above the standard, divided by the total number of students with disabilities who received a valid score and for whom a proficiency level was assigned. Each method of calculation is used in determining whether the LEA is in the Targeted or the Intensive Review, and both are valid for understanding the LEA’s performance on the Math portion of the California Assessment of Student Performance and Progress (CAASPP) and the California Alternate Assessment (CAA).

A. Review of Dashboard Information/Data

The LEA’s performance level for Math Achievement on the Dashboard is a combination of Status Level and Change Level. The SEP Team’s understanding of the Dashboard data and performance levels will be essential in the team’s determination of root causes and corresponding strategies/activities. The SEP Team may determine root causes applicable to their Status Level, Change Level, or both depending on the LEA’s Dashboard data.

Using the data on the 5x5 Mathematics Placement (Grades 3–8 and 11) Detailed Report from the LEA’s 2019 California School Dashboard, complete the charts below with information for the student group: Students with Disabilities.

| Color | Status Level | Change Level | CURRENT STATUS: Average distance from Standard | CHANGE: Difference between current status and prior status |
|-------|--------------|-------------------------|---|---|
| Red | Very Low | Decreased Significantly | -160.5 | -29.9 |

Based on the above information, indicate the area(s) the LEA intends to address.

| Area to Address | Yes or No |
|-----------------|-----------|
| Status Level | Yes |
| Change Level | Yes |

B. Review of APR Data

Using the SPPI data from the LEA's APR, complete the chart below for 3c: Math Achievement.

| LEA's Rate | State Target |
|------------|--------------|
| NC | >13.6% |

Once the LEA has determined the LEA's performance level on the Dashboard and the APR in Math Achievement, complete the chart below.

| Accountability System | Performance Level to Meet Requirements | Did the LEA Meet or Exceed the Performance Level? |
|-----------------------|--|---|
| Dashboard | Blue, Green or Yellow | |
| APR | >13.6% | No |

II. Current Improvement Strategies

Describe and discuss current or recent improvement strategies, relevant to this Element, that the LEA implemented prior to the development of this SEP. For example: Did the strategies result in improved outcomes for students with disabilities? How is improvement measured? Did the LEA address this area in a 2018–19 Performance Indicator Review (PIR) Plan?

| |
|--|
| PIR submitted in Spring, 2019 identified strategies to include |
| 1) Teacher professional development to increase accommodations provided on the CAASPP as well as administering practice tests to familiarize SWD with the test format. |
| 2) Test practice sessions were provided. |
| 3) Instructional strategies were implemented to provide scaffolding to increase performance on open response questions. |
| 4) Instructional focus on development of mathematical language within instruction in general & special education classes. There was insufficient time to see results prior to the 2019 CAASPP administration. |
| 5) A minimum of 8 math prep sessions prior to CAASPP administration. While some prep sessions were provided, there was insufficient time to see results prior to the 2019 CAASPP administration. |
| 6) Collaborative Algebra 1 & 2 classes were added to the master schedule cotaught by general and special education teachers. There was insufficient time to see results prior to the 2019 CAASPP administration. |

III. Data and Analysis

In order to identify appropriate root causes for the LEA's performance in relation to Element 3c: Math Achievement, the LEA should examine formal and informal data to understand the factors contributing to the challenges the LEA is experiencing. The *Data Source Checklist*, below, should guide the SEP Team in next steps, but the range of data review is within the discretion of the SEP Team.

Data Source Checklist

Identify data sources the SEP Team will use in developing the LEA's 2019–20 SEP for Element 3c: Math Achievement. Analyze the selected data sources to find connections/relationships between the data and the LEA's performance.

| Data Sources | Check if Using |
|--|----------------|
| California School Dashboard—Math Achievement for students with disabilities | X |
| California School Dashboard – Comparison to All Students or other student groups | |
| Test Operations Management System (TOMS) Student Score Reports | |
| Test Operations Management System (TOMS) Accommodations | |
| Interim or Other Assessments | X |
| Classroom-level Data — Student Grades, Assignment Grades | |
| APR – Math Achievement, Participation Rate, Least Restrictive Environment (LRE) | X |
| Special Education Information System (e.g., SEIS, Welligent, SIRAS) | |
| Service and/or Pull-Out Schedules | |
| Student Course Enrollment Data Attendance Records, Schedules, and/or Transcripts | X |
| California Longitudinal Pupil Achievement Data System (CALPADS) | |
| Empathy Interview/ Focus Group Data | |
| Observation of Math Class(es) | X |

| Data Sources | Check if Using |
|--|----------------|
| Observation of Testing (CAASPP or Other Testing Environment) | X |
| Professional Development Records | X |
| Curriculum Guides, Lesson Plans, Syllabi | |
| Other School Plans (e.g., Local Accountability Plan (LCAP), Western Association of Schools and Colleges (WASC), Technology Plan) | |
| Policies and Procedures | X |
| Compliance Review Data (Student Record Reviews, SELPA Governance Review, Student Record Review) | |
| Parent Input Data | |
| Other (please state): | |

IV. Additional Factors Affecting Performance

Are there any other factors, internal and/or external, that the SEP Team should consider when evaluating performance for this Element? List in the box below. For example, do the systems, policies, procedures, and/or practices address this Element for students with disabilities, and are they working as intended?

There was insufficient time to see results prior to the 2019 CAASPP administration. Plan is to continue to implement the above and to provide targeted test preparation sessions for students within SDP core classes and within collaborative classes.

V. Root Cause Analysis and Improvement Form

Complete the boxes and charts below. In the Root Cause box, identify a root cause for the LEA's performance level specific to Element 3c: Math Achievement. In the Data Support box, include an explanation of the data and any background information needed for the root cause to be understandable to someone outside the LEA. In the Phase 1 chart, identify the strategies/activities that will address the root cause and provide the required details regarding implementation. In the Phase 2 chart, provide the

required details regarding monitoring. In the last chart, list documentation that the LEA intends to keep regarding implementation and monitoring.

If the LEA completed a 2018–19 PIR Plan, the LEA may consider including root causes from the PIR Plan in the LEA’s 2019–20 SEP if the root cause is still an issue based on analysis of the LEA’s current data.

Note: The boxes and charts below apply to one and only one root cause. Copy and complete a new set of boxes and charts for each additional root cause, if any.

Root Cause:

Student lack of familiarity with CAASPP test format resulted in poor test performance.

Data Support and Background for Root Cause:

CDE Dashboard – SWD poor performance over time. Observation and student report within test session of student frustration and difficulty understanding test questions given test format.

| Phase 1: Improvement Strategy Development | |
|---|--|
| Strategies/Activities for Improvement <i>List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.</i> | |
| 1. | Provide a minimum of 8 focused practice sessions for SWD prior to CAASPP administration |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Resources Required <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Instructional time / instructional personnel |
| 2. | Dedicated teacher time to provide prep sessions. |
| 3. | |
| 4. | |
| 5. | |
| Title of Person(s) Responsible for Implementation <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | Asst. Principal, Student Support Services |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Start Date <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 2/15/2021 |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Date of Completion <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 1. | 4/1/2021 |
| 2. | |

| | |
|---|--|
| 3. | |
| 4. | |
| 5. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | Increase of one status level on CDE School Dashboard Math Indicator |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | CDE School Dashboard |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement.) | |
| 1. | < - 120 from Standard |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

Root Cause:

Instruction did not focus on the process of reasoning, mathematical language and applications designed to prepare students for open responses and mathematical applications.

Data Support and Background for Root Cause:

Review of CAASPP student performance within test categories and instructional practices.

| Phase 1: Improvement Strategy Development | |
|--|---|
| Strategies/Activities for Improvement <i>List at least one Strategy/Activity for this root cause. Insert additional lines if necessary.)</i> | |
| 6. | Teachers to provide scaffolding for open response questions |
| 7. | Teachers to focus on development of mathematical language within instruction in general & special education classes |
| 8. | Increase collaborative Algebra 2 classes to 2. |
| 9. | Increase practice of math applications |
| 10. | Teacher Collab. to increase student engagement |
| Resources Required <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 6. | Dedicated time within PLCs to develop instructional & engagement strategies |
| 7. | Dedicated instructional staff for collaborative classes |
| 8. | IXL for increased practice of math concepts |
| 9. | Delta Math – support instruction |
| 10. | |
| Title of Person(s) Responsible for Implementation <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 6. | Administrator supervision Math Dept. & Administrator over Special Educator |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| Start Date <i>(Align numbers with Strategies/Activities for Improvement.)</i> | |
| 6. | 3/2019 |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

Dedicated c

| Date of Completion (Align numbers with Strategies/Activities for Improvement.) | |
|---|---|
| 6. | 6/2/2021 |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| Phase 2: Monitoring of Improvement | |
| Expected Outcome(s) (Align numbers with Strategies/Activities for Improvement.) | |
| 6. | Increase of one status level on CDE School Dashboard Math Indicator |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| Methods of Measurement (Align numbers with Strategies/Activities for Improvement.) | |
| 6. | CDE School Dashboard |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| Quantifiable Standards of Improvement (Align numbers with Strategies/Activities for Improvement.) | |
| 6. | < - 120 from Standard |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

Documentation of Implementation

Each LEA is required to keep documentation on the implementation and monitoring of the SEP. The documentation should be a record of the strategies/activities and the results of the implementation of the strategies/activities.

The documentation should include the following:

1. Evidence the SEP meetings and strategies/activities have occurred (e.g., agendas, sign in sheets, meeting notes, slide presentations).
2. Indication of changes that have occurred as a result of the strategies/activities (e.g., copy of revised policies and procedures, new tracking mechanisms).
3. Evidence that the SEP Team has monitored the implementation of its plan.
4. Demonstration of the preliminary results of strategies/activities (e.g., surveys, observation notes).
5. Evidence of quantifiable measurement of success, if any (e.g., increasing classroom assessment scores, before-and-after data charts).

List the documentation the SEP Team intends to keep on the above-stated implementation and monitoring activities related to this root cause.

Agenda & sign in sheets for SEP Committee
 Schedule of Prep Sessions
 Master Schedule indicating Collaborative classes
 Observation of instruction in Math classes

Copy and complete the above charts for each additional root cause.

VI. Placement of Forms in the SEP PDF

Place each required *Element Form* in numerical order (or alphabetical order thereafter for unnumbered Elements) after the *LEA Identification Form*. Save as one PDF document. If the LEA uses separate *Root Cause Analysis and Improvement Forms*, the placement of those forms should be directly after the corresponding *Element Form*.

Title the single PDF SEP document with the following naming convention: <Name of LEA><SELPA> 2019–20 SEP-<Targeted or Intensive>.

Prepared by the California Department of Education, July 22, 2020.

Element 3c: Math Achievement
2019–20 SEP
Page 13

Coversheet

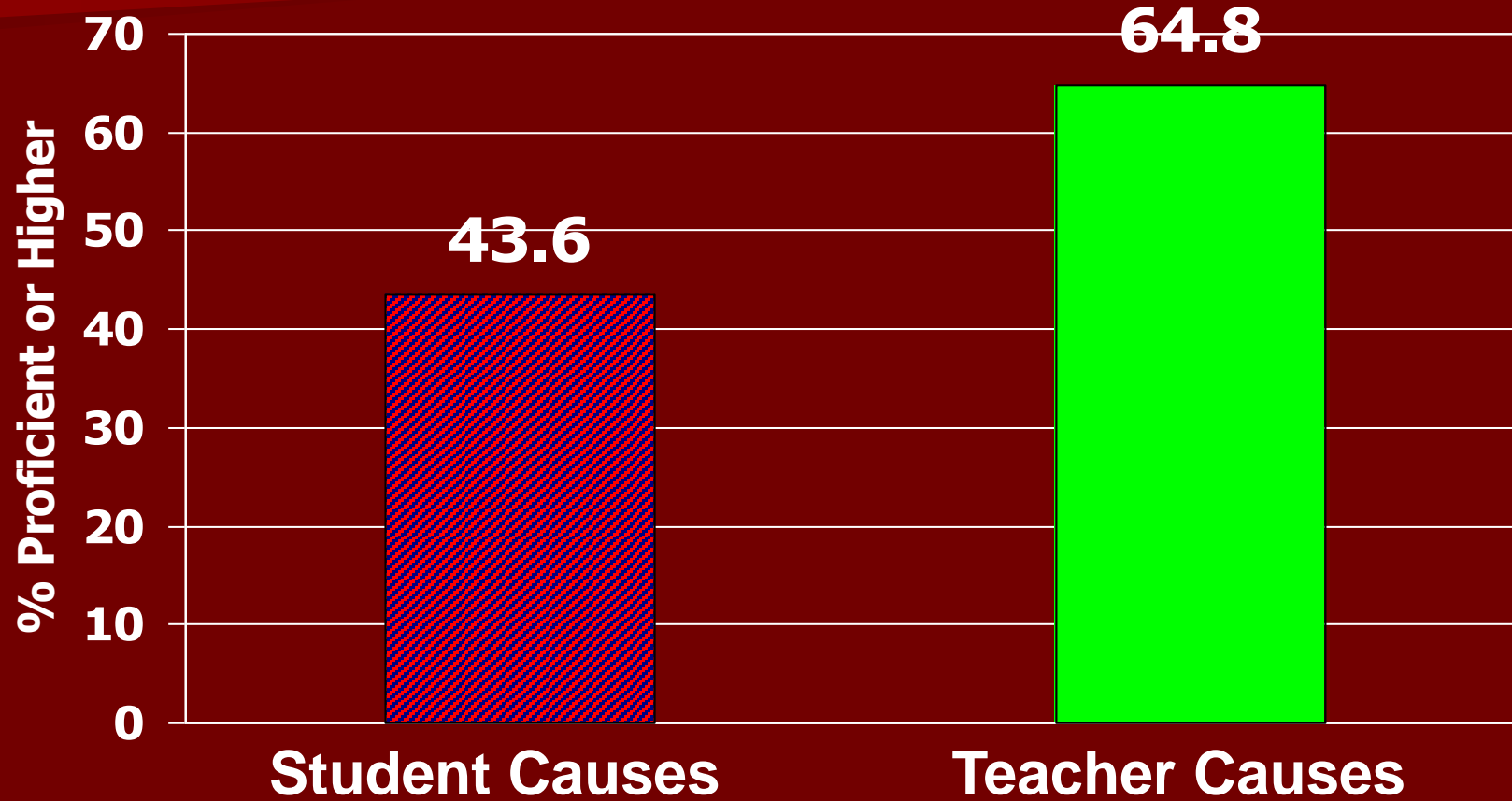
Student Academic Progress and Impact of the Zero

Section: IV. Academic Excellence
Item: B. Student Academic Progress and Impact of the Zero
Purpose: FYI
Submitted by:
Related Material: Effective_Grading_Practices_Jan_2011_updated 2020.pdf

Effective Grading Practices

- ***“Who has the greatest influence on student achievement?”***
- ***Teacher causes or Student causes?***

If You Think That Teachers and Leaders Influence Student Achievement, You Are Right



2006 and 2007 studies of more than 300,000 schools

Source: Reeves, D. B. (2006). *The Learning Leader*. ASCD.

- “I’ve come to a frightening conclusion that I am the decisive element in the classroom. It’s my personal approach that creates the climate. It’s my daily mood that makes the weather. As a teacher, I possess a tremendous power to make a child’s life miserable or joyous. I can be a tool of torture or an instrument of inspiration. I can humiliate or humor, hurt or heal. In all situations, it is my response that decides whether a crisis will be escalated or de-escalated and a child humanized or dehumanized.”

- Haim Ginott

- **What is our confidence level that the grades assigned to students are consistent, accurate, meaningful, and supportive of learning?**

What grade would you give this student?

- C
- C
- MA = Missing Assignment
- D
- C
- B
- MA = Missing Assignment
- MA = Missing Assignment
- B
- A

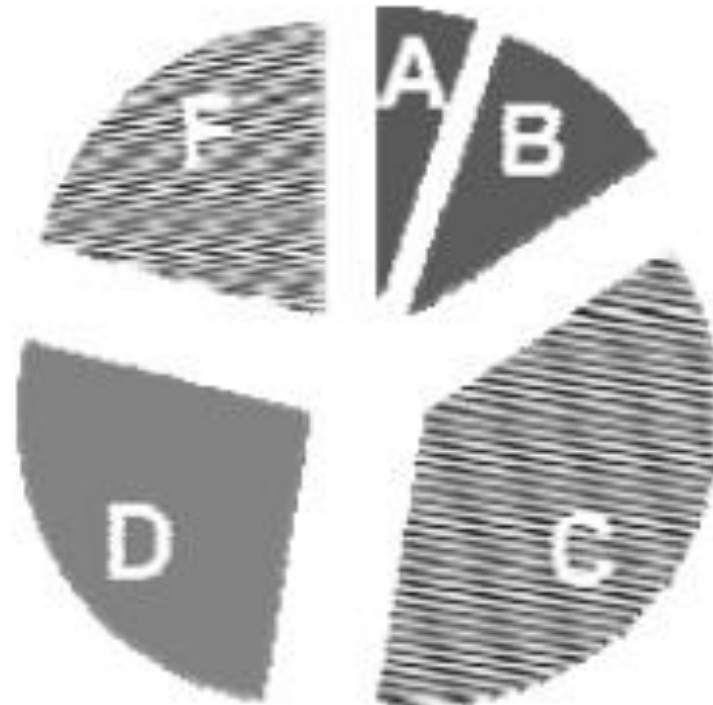
All grades are weighted equally

What grade would you give this student?

- C
- C
- MA = Missing Assignment
- D
- C
- B
- MA = Missing Assignment
- MA = Missing Assignment
- B
- A

All grades are weighted equally

10,000 Teachers Can't Be Wrong, Right?



**Grades for SAME Student
and SAME Performance**

100 point scale

- **A = 90 - 100**
- **B = 80 - 89**
- **C = 70 - 79**
- **D = 60 - 69**
- **F = 50 - 59**
- **F = 40 - 49**
- **F = 30 - 39**
- **F = 20 - 29**
- **F = 10 - 19**
- **F = 0 - 9**

4 point grade scale applying 100 point scale logic

- **A = 4**
- **B = 3**
- **C = 2**
- **D = 1**
- **F = 0**
- **F = -1**
- **F = -2**
- **F = -3**
- **F = -4**
- **F = -5**
- **A = 90 - 100**
- **B = 80 - 89**
- **C = 70 - 79**
- **D = 60 - 69**
- **F = 50 - 59**
- **F = 40 - 49**
- **F = 30 - 39**
- **F = 20 - 29**
- **F = 10 - 19**
- **F = 0 - 9**

Effective Grading Practices

- **Solutions**

- **Grading Scale Proportionate**

- **A= 80+**

- **B= 60-79**

- **C= 40-59**

- **D= 20-39**

- **F= 0-19**

- **Use a four point scale**

- **Assign lowest grade of 50% or 40%**

Grading Scale (weighted)



Palisades Technology Enthusiasts: EdTech PD ▶ Grade Setup

Categories ?

Weight Categories

+ Add

| Category | Weight | % | |
|---------------|--------|--------|---|
| ↕ Attendance | 10 | 10.00% | ★ |
| ↕ PD | 20 | 20.00% | ★ |
| ↕ work | 10 | 10.00% | ★ |
| ↕ assessments | 50 | 50.00% | ★ |
| ↕ final | 10 | 10.00% | ★ |

Course Options

Materials

Updates 43

Gradebook

Grade Setup



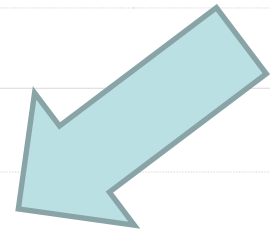
Palisades Technology Enthusiasts: EdTech PD

- Gradebook
- Mastery
- Attendance

sample aaBurr-Sample Grade Report

- Course Options
- Materials
- Updates 43
- Gradebook
- Grade Setup
- Mastery
- Badges
- Attendance
- Members
- Analytics
- Workload Planning
- Conferences
- Nearpod
- Teams Meeting
- WeVideo
- Sutori

| | |
|---|-------------|
| 20-21 PCHS Fall (100%) | NC (35.42%) |
| Attendance (10%) | — |
| PD (20%) | A (100%) |
| Sample Assignment - Ignore 11/23/20 11:59pm | 24 / 24 |
| work (10%) | B (83.33%) |
| What I love about eLearning? 11/20/20 12:00am | 20 / 20 |
| Sample Quiz 11/25/20 11:59pm | 80 / 100 |
| assessments (50%) | NC (0%) |
| Sample Assignment - Board Presentation 12/11/20 11:59pm | NC 0 / 100 |
| final (10%) | — |
| 20-21 PCHS Spring (0%) | — |
| (no grading period) (0%) | A (100%) |



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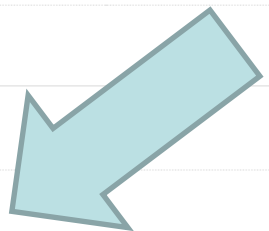
Palisades Technology Enthusiasts: EdTech PD

- Gradebook
- Mastery
- Attendance

sample aaBurr-Sample Grade Report

- Course Options
- Materials
- Updates 43
- Gradebook
- Grade Setup
- Mastery
- Badges
- Attendance
- Members
- Analytics
- Workload Planning
- Conferences
- Nearpod
- Teams Meeting
- WeVideo
- Sutori

| | |
|---|-------------|
| 20-21 PCHS Fall (100%) | NC (54.17%) |
| Attendance (10%) | — |
| PD (20%) | A (100%) |
| Sample Assignment - Ignore 11/23/20 11:59pm | 24 / 24 |
| work (10%) | B (83.33%) |
| What I love about eLearning? 11/20/20 12:00am | 20 / 20 |
| Sample Quiz 11/25/20 11:59pm | 80 / 100 |
| assessments (50%) | NC (30%) |
| Sample Assignment - Board Presentation 12/11/20 11:59pm | NC 30 / 100 |
| final (10%) | — |
| 20-21 PCHS Spring (0%) | — |
| (no grading period) (0%) | A (100%) |



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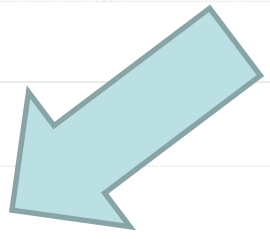
Palisades Technology Enthusiasts: EdTech PD

- Gradebook
- Mastery
- Attendance

sample aaBurr-Sample Grade Report

- Course Options
- Materials
- Updates 43
- Gradebook
- Grade Setup
- Mastery
- Badges
- Attendance
- Members
- Analytics
- Workload Planning
- Conferences
- Nearpod
- Teams Meeting
- WeVideo
- Sutori
- Access Code VRT2N-SSXJ6
Reset

| | |
|---|-------------|
| 20-21 PCHS Fall (100%) | D (66.67%) |
| Attendance (10%) | — |
| PD (20%) | A (100%) |
| Sample Assignment - Ignore 11/23/20 11:59pm | 24 / 24 |
| work (10%) | B (83.33%) |
| What I love about eLearning? 11/20/20 12:00am | 20 / 20 |
| Sample Quiz 11/25/20 11:59pm | 80 / 100 |
| assessments (50%) | NC (50%) |
| Sample Assignment - Board Presentation 12/11/20 11:59pm | NC 50 / 100 |
| final (10%) | — |
| 20-21 PCHS Spring (0%) | — |
| (no grading period) (0%) | A (100%) |



Essential Question for Breakout Room Discussion

What are some ways I can adjust my grade setup so that it effectively reflects student learning?

Coversheet

Approval of the PCHS No Show Policy

Section: IV. Academic Excellence
Item: C. Approval of the PCHS No Show Policy
Purpose: Vote
Submitted by:
Related Material: PCHS No Show Policy.pdf



PALISADES CHARTER HIGH SCHOOL

Empowering Educational Excellence.

No Show Policy

Definition of Three Types of No Shows:

1. **Previously Enrolled:** Students who completed the previous school year, but did not return the next school year.
2. **Matriculated/Pre-Registered/Transferring:** A student is not considered enrolled at PCHS until they begin attending within 5 days of the start of the semester or 5 days within their registration date if they register after the 1st day of the semester.
3. **Students who have had five or more consecutive unexcused absences at any time during the school year.** In these cases, the family/guardians have not been in contact with the school even after the school has sent communications out to the family.

Students are expected to attend on the first day of scheduled classes. A student will be considered a “No-Show” if the student has not attended PCHS on the first day of class and has subsequently accumulated 5 or more consecutive unexcused absences, or has 5 or more consecutive unexcused absences at any other time during the school year. While the student or student family/guardian should contact PCHS to say that student is not going to be attending PCHS, PCHS will put forth reasonable best efforts to locate the student and the location of the school they are attending.

The “No Show” code that will be used in Cal Pads is N470. A student that is a “No Show” is not considered a dropout.

Enrollment records for the current school year are deleted from the SIS if a matriculating student opted out of PCHS and instead transferred elsewhere. Their previous school year enrollment record will then be updated to the appropriate end code upon further investigation. See attached end codes and descriptions for further details.

Coversheet

2020-2021 First Interim Financial Report

Section: V. Finance
Item: A. 2020-2021 First Interim Financial Report
Purpose: FYI
Submitted by:
Related Material: V.A - 2020-21 First Interim Presentation.pdf
V.A - First Interim & Actuals to 10-31-2020.pdf
V.A -PCHS 1ST INTERIM 2020-2021 - SACS FORM.pdf

2020-2021 First Interim Budget

By: Juan Pablo Herrera & Arleta Ilyas

Palisades Charter High School

Presented on: December 8, 2020

Presentation

- Adopted Budget/Revised E-Learning vs. First Interim
 - Purpose & Student Return Assumptions
 - 2020-2021 Budget Evolution
 - Revenue & Expenditure Summary
 - Revenue & Expenditure Variances Explained
- Multi-Year Projection
- Immediate Concerns



Purpose of First Interim & Learning Model Assumptions

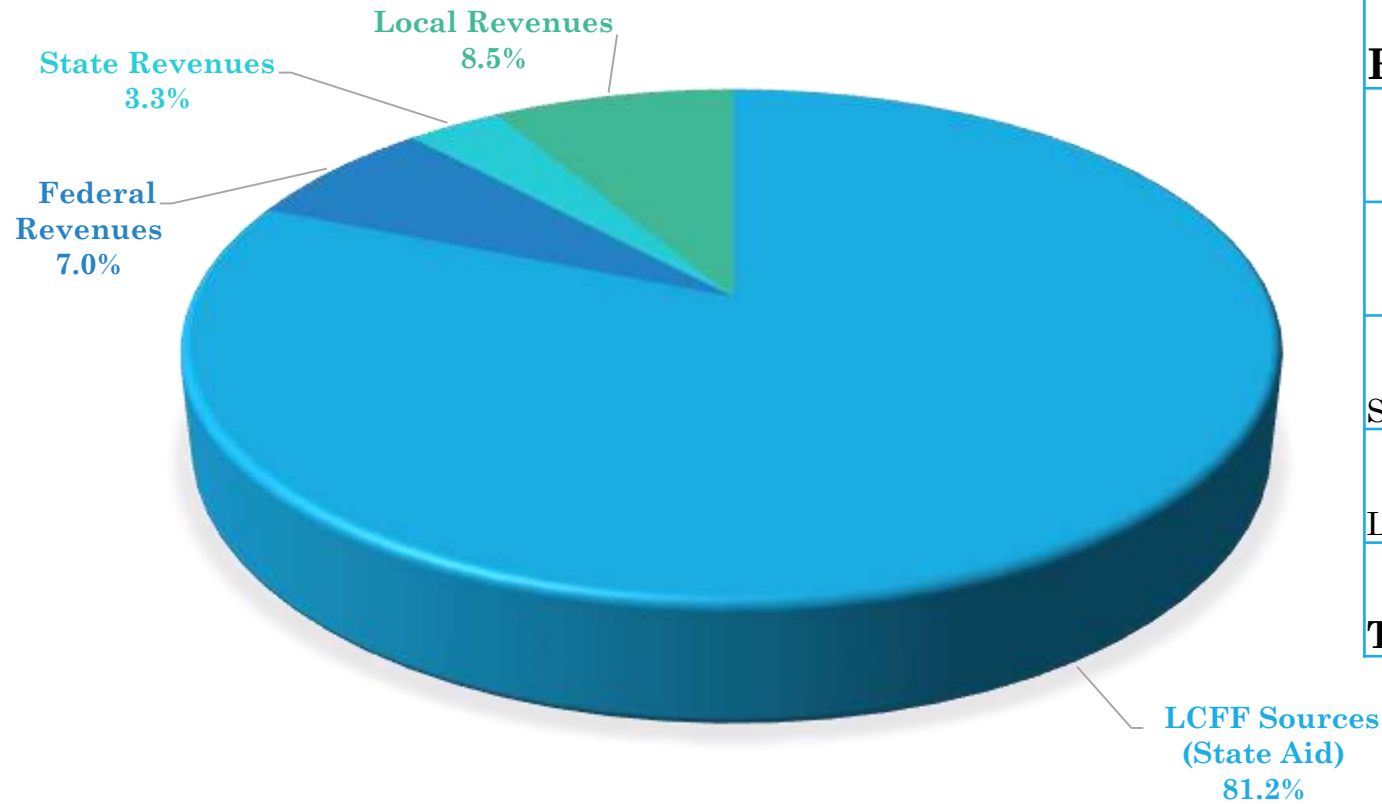
- The purpose of the first interim report is to provide all stakeholders, along with the State of CA with a snapshot of PCHS' financial condition at a point in time.
- Projections are made based on state funding, which is dependent on the current health of the state economy
- Due to the uncertainty of the COVID-19 pandemic, the following assumptions were made when projecting our first interim budget:
 - 3-month hybrid return
 - Bringing back high-risk/special needs students 45 days before hybrid return



2020-2021 Budget: An Evolution

| Revenue | 2020-2021 Adopted Budget (6/5/20) | 2020-2021 Revised Budget (one semester of e-learning, 8/17/20) | Budget Updates (1 month hybrid, 10/1/20) | Budget Updates (3 month hybrid, 10/1/20) | Budget Updates (5month hybrid, 10/1/20) | 20/21 Actuals to Date (10/31/2020) | 20/21 First Interim Projections |
|---|-----------------------------------|--|--|--|---|------------------------------------|---------------------------------|
| LCFF | \$29,539,184 | \$29,539,184 | \$29,539,379 | \$29,539,379 | \$29,539,379 | \$8,607,191 | \$29,539,379 |
| Federal | \$2,673,650 | \$2,673,650 | \$2,647,697 | \$2,647,697 | \$2,647,697 | \$1,347,306 | \$2,534,912 |
| State | \$1,203,854 | \$1,203,854 | \$1,203,855 | \$1,203,855 | \$1,203,855 | \$486,281 | \$1,204,517 |
| Local | \$3,201,689 | \$3,201,689 | \$3,201,689 | \$3,201,689 | \$3,201,689 | \$916,756 | \$3,107,154 |
| Total Revenue: | \$36,618,377 | \$36,618,377 | \$36,592,620 | \$36,592,620 | \$36,592,620 | \$11,339,534 | \$36,385,962 |
| Expense | 2020-21 Adopted | 2020-21 Rev. | 1 mo. Hybrid | 3 mos. Hybrid | 5 mos. Hybrid | Actuals to Date | 20/21 First Interim Proj. |
| Cert Salaries | \$14,103,004 | \$14,379,666 | \$14,903,838 | \$14,903,838 | \$14,903,838 | \$3,694,699 | \$14,921,160 |
| Class Salaries | \$4,369,612 | \$4,563,058 | \$4,689,073 | \$4,689,073 | \$4,689,073 | \$988,965 | \$4,833,155 |
| Benefits | \$7,844,229 | \$8,083,440 | \$8,149,796 | \$8,149,796 | \$8,149,796 | \$2,193,704 | \$8,193,544 |
| Books/Supplies | \$694,027 | \$1,521,035 | \$1,546,035 | \$1,546,035 | \$1,546,035 | \$859,501 | \$1,521,063 |
| Services, Other Operating Exp. | \$5,647,067 | \$5,381,420 | \$5,644,420 | \$5,918,420 | \$6,192,420 | \$1,401,049 | \$5,529,549 |
| Depreciation | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$300,000 | \$900,000 |
| Interest/Other Outgo | \$330,306 | \$353,730 | \$353,730 | \$353,730 | \$353,730 | \$110,420 | \$353,730 |
| Total Expense | \$33,888,246 | \$35,182,349 | \$36,186,891 | \$36,460,891 | \$36,734,891 | \$9,548,338 | \$36,252,201 |
| Net Balance (financial statement balance) | -\$225,503 | \$1,436,029 | \$405,728 | \$131,728 | -\$142,272 | \$1,791,196 | \$133,761 |
| Net balance (cash statement balance) | \$351,631 | \$1,933,163 | \$877,862 | \$603,862 | \$329,862 | \$1,925,209 | \$605,895 |

2020-2021 First Interim Revenue Summary



| Revenue Type | Amount |
|--------------------------|---------------------|
| LCFF Sources (State Aid) | \$29,539,379 |
| Federal Revenues | \$2,534,912 |
| State Revenues | \$1,204,517 |
| Local Revenues | \$3,107,154 |
| Total Revenues | \$36,385,962 |

■ LCFF Sources (State Aid)
 ■ Federal Revenues
 ■ State Revenues
 ■ Local Revenues



Revenue

| | Adopted Budget (6/5/2020) | Revised Budget (one semester of e-learning, 8/17/20) | Actuals to Date (10/31/2020) | First Interim | Revised Budget vs. First Interim |
|-------------------------|------------------------------|---|---------------------------------|---------------------|--|
| LCFF Sources | \$27,196,847 | \$29,539,184 | \$8,607,191 | \$29,539,379 | \$- |
| Federal Revenues | \$1,653,358 | \$2,673,650 | \$1,347,306 | \$2,534,912 | (\$138,738) |
| Other State Revenues | \$969,722 | \$1,203,854 | \$468,281 | \$1,204,517 | \$663 |
| Other Local Revenues | \$3,842,816 | \$3,201,689 | \$916,756 | \$3,107,154 | (\$94,535) |
| Total | \$33,662,742 | \$36,618,377 | \$11,339,534 | \$36,385,962 | (\$232,415) |



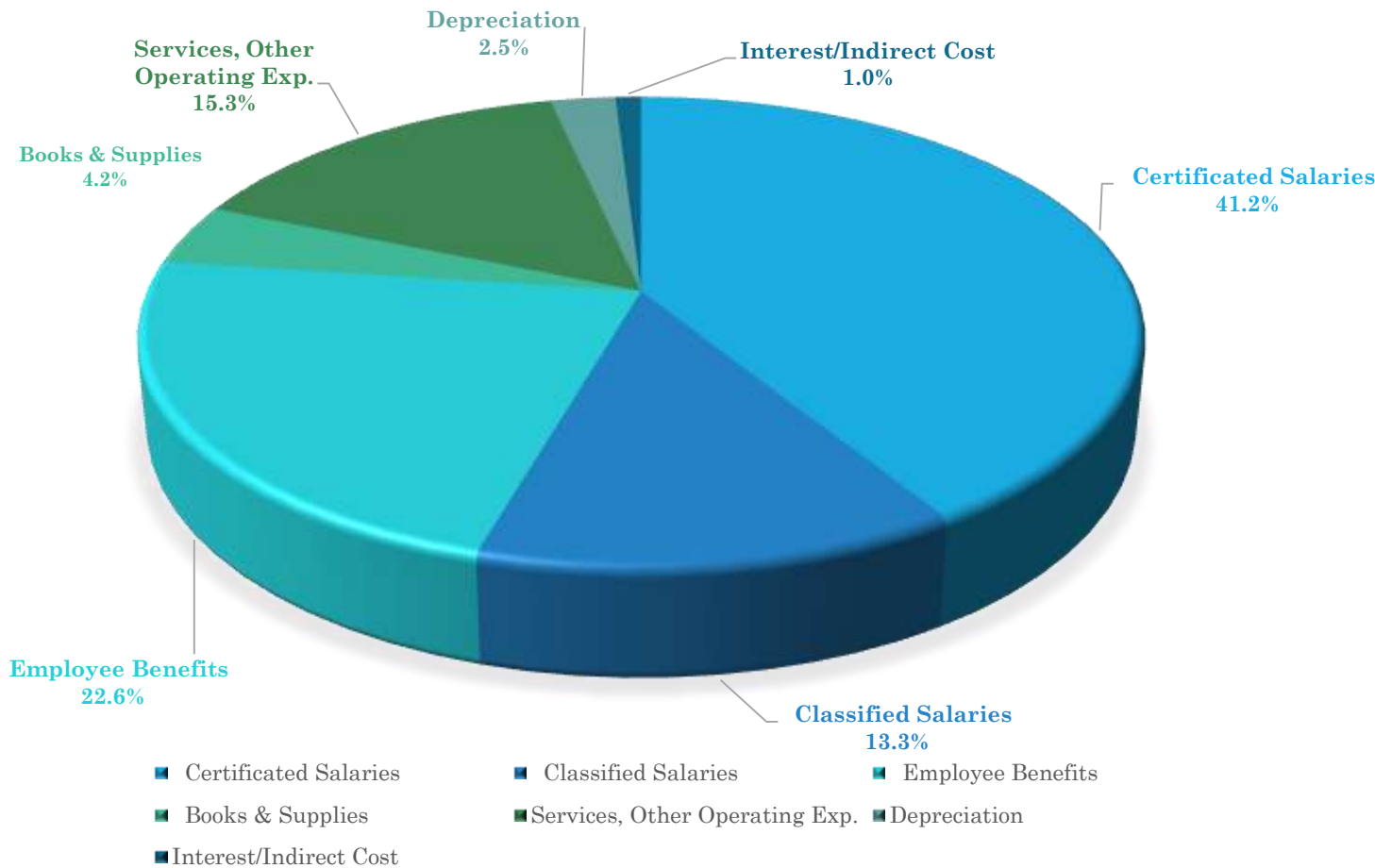


Revenue: Revised vs. First Interim

- Federal:
 - Decreased Title 1 Funding per CDE: **-\$21,339**
 - Decreased Title II Funding per CDE: **-\$5,732**
 - Increased Title III-EL Students per CDE: \$1,020
 - Increased Title III-Immigrant per CDE: \$25
 - Increased Title IV funding per CDE: \$73
 - Decreased federal child nutrition funding: **-\$112,702**
- State:
 - Decreased state child nutrition funding **-\$9,421**
 - Carryover of state COVID funds \$10,084
- Local:
 - Decreased food a la carte sales: **-\$94,272**



2020-2021 First Interim Expenditure Summary



| Expenditures | Amount |
|--------------------------------|---------------------|
| Certificated Salaries | \$14,921,160 |
| Classified Salaries | \$4,833,155 |
| Employee Benefits | \$8,193,544 |
| Books & Supplies | \$1,521,063 |
| Services, Other Operating Exp. | \$5,529,549 |
| Depreciation | \$900,000 |
| Interest/Indirect Cost | \$353,730 |
| Total Expenditures | \$36,252,201 |



Expenditures

| | Adopted Budget (6/5/2020) | Revised Budget (one semester of e-learning, 8/17/20) | Actuals to Date (10/31/2020) | First Interim | Revised Budget vs. First Interim |
|--------------------------|------------------------------|---|---------------------------------|---------------------|--|
| Certificated Salaries | \$14,103,004 | \$14,379,666 | \$3,694,699 | \$14,921,160 | \$541,494 |
| Classified Salaries | \$4,369,612 | \$4,563,058 | \$988,965 | \$4,833,155 | \$270,097 |
| Benefits | \$7,844,229 | \$8,083,440 | \$2,193,704 | \$8,193,544 | \$110,104 |
| Books/Supplies | \$694,027 | \$1,521,035 | \$859,501 | \$1,521,063 | \$28 |
| Services/Other Operating | \$5,647,067 | \$5,381,420 | \$1,401,049 | \$5,529,549 | -\$148,129 |
| Depreciation | \$900,000 | \$900,000 | \$300,000 | \$900,000 | \$- |
| Interest/Indirect | \$330,306 | \$353,730 | \$110,420 | \$353,730 | \$- |
| Total | \$33,888,246 | \$35,182,349 | \$9,548,338 | \$36,252,201 | \$1,069,852 |



Expenditures: Revised vs. First Interim



- Increase in Certificated Salaries & Benefits: \$589,954
 - \$14K in Saturday School Support Program
 - \$524K in retroactive and off-schedule pay increases
 - \$51K in statutory benefits
- Increase in Classified Salaries & Benefits: \$331,740
 - \$140K in tutoring expenses funded by LLM funds
 - \$130K in retroactive and off-schedule pay increases
 - \$61K in statutory benefits
- Increased Books & Supplies: \$48K
 - \$10K increase in textbook expenses (funded by LLM)
 - \$38K increase in Non-Cap Equipment (\$25K for furniture by B/F committee, \$13K unallocated LLM)
- Decreased spending in food service supplies due to school closure: **-\$48K**
- Increased operations supplies (PPE/hybrid related costs) by \$198K
- Realized cost savings in cafeteria, janitorial, and security in a 3-month hybrid model: **-\$136K**
- Increase in transportation expenses due to 3-mos hybrid model/at-risk busing: \$85K
- Increase in Capex (approved by B/F committee for emergency repairs): \$25K



Revenue & Expenditure Summary

| Revenue | 20/21 2 nd Semester Return Revision | 20/21 Actuals to Date (10/31/2020) | 20/21 First Interim Projections |
|-----------------------|--|------------------------------------|---------------------------------|
| LCFF | \$29,539,184 | \$8,607,191 | \$29,539,379 |
| Federal | \$2,673,650 | \$1,347,306 | \$2,534,912 |
| State | \$1,203,854 | \$486,281 | \$1,204,517 |
| Local | \$3,201,689 | \$916,756 | \$3,107,154 |
| Total Revenue: | \$36,618,377 | \$11,339,534 | \$36,385,962 |

| Expense | 20/21 2 nd Semester Return Revision | 20/21 Actuals to Date (10/31/2020) | 20/21 First Interim Projections |
|--|--|------------------------------------|---------------------------------|
| Cert Salaries | \$14,379,666 | \$3,694,699 | \$14,921,160 |
| Class Salaries | \$4,563,058 | \$988,965 | \$4,833,155 |
| Benefits | \$8,083,440 | \$2,193,704 | \$8,193,544 |
| Books/Supplies | \$1,521,035 | \$859,501 | \$1,521,063 |
| Services, Other Operating Exp. | \$5,381,420 | \$1,401,049 | \$5,529,549 |
| Depreciation | \$900,000 | \$300,000 | \$900,000 |
| Debt Service/Indirect | \$353,730 | \$110,420 | \$353,730 |
| Total Expense | \$35,182,349 | \$9,548,338 | \$36,252,201 |
| Net Balance (financial statement balance) | \$1,436,029 | \$1,791,196 | \$133,761 |
| Net balance (cash statement balance) | \$1,933,163 | \$1,925,209 | \$605,895 |



Multi-Year Projection: State Assumptions

- These are assumptions provided by the state, which PCHS is required to use in order to project our financial health in the future.
- State guidance advises PCHS to assume a flat COLA on revenue, meaning revenues will remain flat for the next 3 years.
- PCHS also assumes flat ADA at 2,907.
- PCHS assumes revenue & expenses from Learning Loss & Mitigation COVID relief as one-time funds.
- Assumes \$691K payment to lifetime benefits funds in the out years.
- The OPEB Liability is also factored into the projections and PCHS's ending balance.

**2020-21 FIRST INTERIM ASSUMPTION GUIDELINES
(AS OF OCTOBER 2020)**

**PROJECTIONS
FOR
FISCAL YEARS 2020-21 THROUGH 2023-24**

The guidelines below are provided to assist you with projections for Fiscal Years 2020-21, 2021-22, 2022-23 and 2023-24

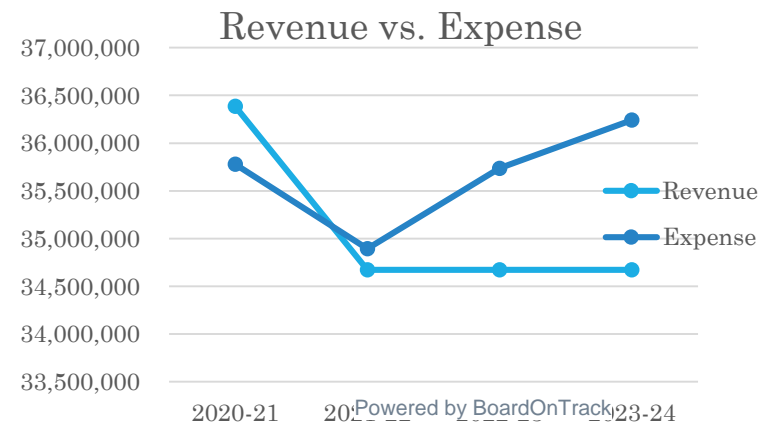
| LCFF REVENUE | | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
|--|---------------|----------------|----------------|----------------|----------------|
| Statutory COLA (based on DOF estimates) | | 2.31% | 2.48% | 3.26% | 1.80% |
| Recommended Funded COLA | | 0.00% | 0.00% | 0.00% | 0.00% |
| LOTTERY REVENUE | | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
| Unrestricted per ADA | | \$150 | \$150 | \$150 | \$150 |
| Restricted for Instructional Materials per ADA | | \$49 | \$49 | \$49 | \$49 |
| Total Lottery Revenue per ADA | | \$199 | \$199 | \$199 | \$199 |
| MANDATED BLOCK GRANT | | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
| Districts per ADA | Grades K - 8 | \$32.18 | \$32.18 | \$32.18 | \$32.18 |
| | Grades 9 - 12 | \$61.94 | \$61.94 | \$61.94 | \$61.94 |
| Charters per ADA | Grades K - 8 | \$16.86 | \$16.86 | \$16.86 | \$16.86 |
| | Grades 9 - 12 | \$46.87 | \$46.87 | \$46.87 | \$46.87 |
| OTHER FACTORS | | 2020-21 | 2021-22 | 2022-23 | 2023-24 |
| CalSTRS Employer Rates | | 16.15% | 16.00% | 18.10% | 18.10% |
| CalPERS Employer Rates | | 20.70% | 23.00% | 26.30% | 27.30% |
| Interest Rate for 10-year Treasuries | | 0.89% | 1.24% | 1.70% | 2.10% |
| CA Consumer Price Index (CPI) | | 0.98% | 1.59% | 1.87% | 2.33% |

Attachment No 2 to:
Informational Bulletin No. 5292



Multi-Year Projection

| | FY 2020-21 Current (Base Year) | FY 2021-22 (1 st Projected Year) | FY 2022-23 (2 nd Projected Year) | FY 2023-24 (3 rd Projected Year) |
|--|-----------------------------------|--|--|--|
| Revenues | \$36,385,962 | \$34,673,178 | \$34,673,178 | \$34,678,178 |
| Expenditures | \$35,780,067 | \$34,893,496 | \$35,738,036 | \$36,242,392 |
| Cash Balance | \$605,895 | -\$220,317 | -\$1,064,858 | -\$1,569,219 |
| Depreciation | \$900,000 | \$900,000 | \$900,000 | \$900,000 |
| Fund Balance (Financial Reporting Basis) | \$133,761 | -\$620,317 | -\$1,489,858 | -\$2,019,213 |
| OPEB Requirement (GASB 75: Lifetime Health Benefits) | \$1,228,631 | \$843,631 | \$843,631 | \$843,631 |
| Fund Balance w/OPEB Reporting | -\$1,094,870 | -\$1,463,948 | -\$2,333,489 | -\$2,862,844 |



Immediate Concerns/Next Steps

- Monitor state budget analysis
- Cash Flow (Deferrals/State IOU)
- Reserves
- COVID-19 Impact
- Develop re-opening plans for hybrid model, monitor impacts to revenue and expense
- Track multi-year projections
- STRS/PERS increases



Palisades Charter High School

At-a-Glance

Budget Timeline

2020-2021

| Category | Object Code | 2020-2021 Board Approved Budget, 6/5/20 | 2020-2021 Revised Budget (E-Learn/Return 2nd Semester, per CA gov 7/30/2020) | | Budget Updates | Budget Updates | Budget Updates | Acutals to Date 10/31/2020 | 1st interim updates |
|--|-------------|---|--|------------------------------|-----------------------------|----------------------------|----------------|----------------------------|---------------------|
| | | | 8/17/20 | 10/1/2020 (one month hybrid) | 10/1/2020 (3 months hybrid) | 10/1/2020 (5 month hybrid) | | | |
| Revenue | | | | | | | | | |
| LCFF | 8011 | \$ 27,196,847 | \$ 29,539,184 | \$ 29,539,379 | \$ 29,539,379 | \$ 29,539,379 | \$ 29,539,379 | \$ 8,607,191 | \$ 29,539,379 |
| Federal | 8200 | \$ 1,653,358 | \$ 2,673,650 | \$ 2,647,697 | \$ 2,647,697 | \$ 2,647,697 | \$ 2,647,697 | \$ 1,347,306 | \$ 2,534,912 |
| State | 8500 | \$ 969,722 | \$ 1,203,854 | \$ 1,203,855 | \$ 1,203,855 | \$ 1,203,855 | \$ 1,203,855 | \$ 468,281 | \$ 1,204,517 |
| Local | 8600 | \$ 3,842,816 | \$ 3,201,689 | \$ 3,201,689 | \$ 3,201,689 | \$ 3,201,689 | \$ 3,201,689 | \$ 916,756 | \$ 3,107,154 |
| Total | | \$ 33,662,742 | \$ 36,618,377 | \$ 36,592,620 | \$ 36,592,620 | \$ 36,592,620 | \$ 36,592,620 | \$ 11,339,534 | \$ 36,385,962 |
| Expense | | | | | | | | | |
| Certificated Salaries | 1000 | \$ 14,103,004 | \$ 14,379,666 | \$ 14,903,838 | \$ 14,903,838 | \$ 14,903,838 | \$ 14,903,838 | \$ 3,694,699 | \$ 14,921,160 |
| Classified Salaries | 2000 | \$ 4,369,612 | \$ 4,563,058 | \$ 4,689,073 | \$ 4,689,073 | \$ 4,689,073 | \$ 4,689,073 | \$ 988,965 | \$ 4,833,155 |
| Benefits | 3000 | \$ 7,844,229 | \$ 8,083,440 | \$ 8,149,796 | \$ 8,149,796 | \$ 8,149,796 | \$ 8,149,796 | \$ 2,193,704 | \$ 8,193,544 |
| Books & Supplies | 4000 | \$ 694,027 | \$ 1,521,035 | \$ 1,546,035 | \$ 1,546,035 | \$ 1,546,035 | \$ 1,546,035 | \$ 859,501 | \$ 1,521,063 |
| Services | 5000 | \$ 5,647,067 | \$ 5,381,420 | \$ 5,644,420 | \$ 5,918,420 | \$ 6,192,420 | \$ 6,192,420 | \$ 1,401,049 | \$ 5,529,549 |
| Depreciation | 6000 | \$ 900,000 | \$ 900,000 | \$ 900,000 | \$ 900,000 | \$ 900,000 | \$ 900,000 | \$ 165,987 | \$ 900,000 |
| Interest/Other Outgo | 7000 | \$ 330,306 | \$ 353,730 | \$ 353,730 | \$ 353,730 | \$ 353,730 | \$ 353,730 | \$ 110,420 | \$ 353,730 |
| Total | | \$ 33,888,246 | \$ 35,182,349 | \$ 36,186,891 | \$ 36,460,891 | \$ 36,734,891 | \$ 36,734,891 | \$ 9,414,325 | \$ 36,252,201 |
| Net ending balance, financial reporting | | | | | | | | | |
| | | \$ (225,503) | \$ 1,436,029 | \$ 405,728 | \$ 131,728 | \$ (142,272) | \$ 1,925,209 | \$ 133,761 | |

Palisades Charter High School
2020-2021 First Interim Projections and Actuals until 10/31/2020

| | 2020-2021 Board Approved Adopted Budget 6/5/2020 | 2020-2021 Revised Budget (E-Learn/Return 2nd Semester, per CA gov 7/30/2020) 8/17/20 | Budget Updates 10/1/2020 (3 months hybrid) | 2020-2021 Actuals to Date 10/31/2020 | 2020-2021 1st Interim Updates | % received/s pent (Budget vs. actuals) | Comments |
|--|--|--|--|--------------------------------------|-------------------------------|--|---|
| ADA ESTIMATES/ACTUAL FUNDED | 2,907.00 | 2,907 | 2,907 | | 2,907 | | |
| LCFF FUNDING PER ADA | \$ 10,188 | 10,160 | 10,160 | | 10,160 | | Per LCFF Calculator, as of 7/14/2020, Hold Harmless 19/20 |
| Deficit Factor (as of 5/19 May Revise) | 8.17% | 0% | | | | | |
| | \$ 9,356 | | | | | | |
| EPA Funding-Prop 30 | 4,732,251 | 5,139,818 | 6,558,368 | 1,639,592 | 6,558,368 | 25% | Latest EPA Projection as of 9/10/20 |
| LCFF Entitlement - State Aid - Current Year | 15,339,022 | 16,660,100 | 14,565,870 | 4,078,444 | 14,565,870 | 28% | LCFF Entitlement as of 9/10/20 |
| LCFF Entitlement - State Aid - PY adjustments | | | | | | | |
| ADA Adjustment | | | | | | | |
| LCFF PY Adjustments | | | | | | | |
| C S Funding In Lieu of PropTax - | 7,125,574 | 7,739,266 | 8,415,141 | 2,889,155 | 8,415,141 | 34% | Total LCFF Entitlement - EPA - state aid |
| C S Funding In Lieu of PropTax - PY adjustments | | | | | | | |
| LCFF Funding-Total | 27,196,847 | 29,539,184 | 29,539,379 | 8,607,191 | 29,539,379 | 18% | |
| NCLB:T1,Basic School Support | 315,175 | 315,175 | 293,836 | - | 293,836 | 0% | updated # per CDE as of 10/1/2020 |
| Special Ed: IDEA Basic Local Assistance Entitlement | 602,592 | 602,675 | 602,675 | 204,901 | 602,592 | 34% | \$207.29/ADA PER LAUSD SELPA |
| NCLB:TII, Teacher Quality/ESSA | 62,303 | 62,303 | 56,571 | | 56,571 | 0% | updated # per CDE 10/1/2020 |
| Title III Part A English Language - (24 students) | 2,526 | 2,526 | 3,546 | | 3,546 | 0% | updated # per CDE 10/1/2020 (31 students) |
| Title III Part A Immigrant - (37 students) | 3,535 | 3,535 | 3,560 | | 3,560 | 0% | updated # per CDE 10/1/2020 (34 students) |
| ESSA:TIV,Student Support and Academic Enrichment | 23,337 | 23,337 | 23,410 | | 23,410 | 0% | updated # per CDE 10/1/2020 |
| Perkins | 37,102 | 37,102 | 37,102 | | 37,102 | 0% | |
| DOR-Rehab | 20,000 | 20,000 | 20,000 | | 20,000 | 0% | |
| COVID-19 Grant (Federal CARES Act) | 264,782 | 261,630 | 261,630 | 65,408 | 261,630 | 25% | PER CDE |
| Learning Loss & Mitigation (GEER) | | 107,643 | 107,643 | | 107,643 | 0% | |
| Learning Loss & Mitigation (CRF) | | 1,076,721 | 1,076,721 | 1,076,721 | 1,076,721 | 100% | |
| Child Nutrition Program | 322,006 | 161,003 | 161,003 | 276 | 48,301 | 0% | 3 mos sales |
| Federal Revenues-Total | 1,653,358 | 2,673,650 | 2,647,697 | 1,347,306 | 2,534,912 | 47% | |
| | 412,004 | | | | | | |
| Learning Loss & Mitigation - State | | 252,447 | 252,447 | 252,447 | 252,447 | 100% | State Learning Loss & Mitigation Funds |
| State Lottery:Non Prop 20 - Current Year | 444,771 | 436,110 | 436,110 | - | 436,110 | 0% | \$150/ADA |
| State Lottery:Non Prop 20 - PY adjustments | | | | - | | | |
| Child Nutrition: School Programs | 27,050 | 13,525 | 13,525 | 22 | 4,104 | 0% | 3 mos sales |
| Mandated Costs Reimbursement | 136,251 | 136,270 | 136,270 | | 136,270 | 0% | |
| Classified School Employees Professional Development Block Grant | | | | | | | |
| State Lottery:Prop 20 Inst Matls-Current Year | 156,978 | 142,463 | 142,463 | | 142,463 | 0% | \$49/ADA |
| State Lottery:Prop 20 Ins Matls-PY adjustments | | | | | | | |
| Special Education- AB602 - MOVE TO LOCAL | - | | | | | | |
| Student ID/CAHSEE | 12,073 | | | | | | |
| CTE Grant | 192,599 | 223,040 | 223,040 | 205,729 | 223,040 | 92% | \$173K + \$50K carryover from 19/20 |
| College Readiness Block Grant | | | | | | | |

Palisades Charter High School
2020-2021 First Interim Projections and Actuals until 10/31/2020

| | 2020-2021 Board Approved Adopted Budget 6/5/2020 | 2020-2021 Revised Budget (E-Learn/Return 2nd Semester, per CA gov 7/30/2020) 8/17/20 | Budget Updates 10/1/2020 (3 months hybrid) | 2020-2021 Actuals to Date 10/31/2020 | 2020-2021 1st Interim Updates | % received/s pent (Budget vs. actuals) | Comments |
|---|--|--|--|--------------------------------------|-------------------------------|--|--|
| Low-Performing Students Block Grant | | - | | | | | |
| LAUSD-Sp Ed Grants (Option 3) | - | - | | | | | |
| COVID-19 Grant | | | | 10,084 | 10,084 | | |
| Other State Revenues-Total | 969,722 | 1,203,854 | 1,203,855 | 468,281 | 1,204,517 | 39% | |
| Special Ed AB602 - State | 1,908,009 | 1,908,272 | 1,908,272 | 648,785 | 1,908,009 | 34% | \$656.35/ADA PER LAUSD SELPA |
| LAUSD - SPED GRANT OPTION 3 | 125,000 | 125,000 | 125,000 | - | 125,000 | 0% | |
| Food Service Sales | 269,348 | 134,674 | 134,674 | - | 40,402 | 0% | 3 mo sales |
| Leases & Rentals (POOLS/PERMIT/CIVIC CENTER ETC.) | 911,000 | 504,284 | 504,284 | 71,620 | 504,284 | 14% | potential income loss of \$406K (Jul-Dec income) |
| Interest | 129,459 | 129,459 | 129,459 | 10,101 | 129,459 | 8% | |
| Fundraising | 500,000 | 400,000 | 400,000 | 186,250 | 400,000 | 47% | based on data from ed fund collections |
| Other Local Revenues-Total | 3,842,816 | 3,201,689 | 3,201,689 | 916,756 | 3,107,154 | 29% | |
| Total Revenue | 33,662,742 | 36,618,377 | 36,592,620 | 11,339,534 | 36,385,962 | 31% | |
| Teachers | 13,033,997 | 13,033,997 | 13,033,997 | 3,154,369 | 13,048,319 | 24% | Includes Saturday School Support Program (\$14K) |
| School Admin | 905,118 | 905,118 | 905,118 | 251,506 | 905,118 | 28% | |
| Librarians | 129,614 | 136,090 | 136,090 | 36,390 | 139,090 | 27% | |
| Guidance,Welfare (Counselors) | 722,863 | 805,839 | 805,839 | 226,413 | 805,839 | 28% | |
| Sub Teachers | 48,200 | 235,410 | 235,410 | 26,021 | 235,410 | 11% | |
| Other Support/Impact of / Step and Column | 117,865 | 117,865 | 117,865 | | 117,865 | 0% | |
| Reduced Auxiliaries/Periods-Net | (584,486) | (584,486) | (584,486) | | (584,486) | 0% | |
| Less: FTE's not replacing | (270,167) | (270,167) | (270,167) | | (270,167) | 0% | |
| Certificated Retro | | | 216,002 | | 271,277 | 0% | Certificated pay increase effective 2019-2020, includes PD time |
| Certificated Off Schedule Pay | | | 308,169 | | 252,895 | 0% | 2020-2021 Certificated Off-schedule increase |
| Certificated Salaries | 14,103,004 | 14,379,666 | 14,903,838 | 3,694,699 | 14,921,160 | 25% | |
| Inst'l Aides | 930,455 | 783,601 | 783,601 | 163,904 | 783,601 | 21% | |
| Admin. Sal | 410,452 | 410,452 | 410,452 | 122,607 | 410,452 | 30% | |
| Clerical/Office | 1,906,462 | 1,906,462 | 1,906,462 | 446,111 | 1,906,462 | 23% | |
| Classified Subs | 34,302 | 34,302 | 34,302 | - | 34,302 | 0% | |
| Maint./Oper | 113,204 | 119,204 | 119,204 | 38,795 | 119,204 | 33% | |
| Food Services | 47,682 | 47,682 | 47,682 | 6,064 | 47,682 | 13% | |
| Math Paraprofessionals | 163,756 | 175,083 | 175,083 | 25,200 | 175,083 | 14% | |
| Other Classified | 961,543 | 1,284,516 | 1,284,516 | 186,284 | 1,424,516 | 15% | Tutoring expense moved from consulting to paraprofessional salaries (\$140K) |
| Impact Step and Column | - | - | | | - | | |
| Proposed New Positions/Hours | (198,244) | (198,244) | (198,244) | | (198,244) | 0% | |
| Classified Retro | | | 68,746 | | 57,974 | 0% | Classified pay increase effective March 2020, includes PD time |
| Classified Off Schedule Pay | | | 57,269 | | 72,123 | 0% | 2020-2021 Classified off schedule increase |
| Classified Salaries | 4,369,612 | 4,563,058 | 4,689,073 | 988,965 | 4,833,155 | 21% | |
| Total Salaries | 18,472,616 | 18,942,724 | 19,592,911 | 4,683,664 | 19,754,315 | 24% | |
| STRS - Certificated | 2,277,635 | 2,322,316 | 2,357,200 | 571,564 | 2,368,925 | 24% | |
| PERS - Classified | 768,833 | 944,553 | 958,783 | 172,655 | 985,534 | 18% | |
| OASDI Regular - Certificated | 15,000 | 15,000 | 15,000 | 1,188 | 9,000 | 8% | |

Palisades Charter High School
2020-2021 First Interim Projections and Actuals until 10/31/2020

| | 2020-2021 Board Approved Adopted Budget 6/5/2020 | 2020-2021 Revised Budget (E-Learn/Return 2nd Semester, per CA gov 7/30/2020) 8/17/20 | Budget Updates 10/1/2020 (3 months hybrid) | 2020-2021 Actuals to Date 10/31/2020 | 2020-2021 1st Interim Updates | % received/s pent (Budget vs. actuals) | Comments |
|--|--|--|--|--------------------------------------|-------------------------------|--|---|
| OASDI Regular - Classified | 270,916 | 282,910 | 290,723 | 61,194 | 299,656 | 21% | |
| OASDI Medicare - Certificated | 204,494 | 208,505 | 216,106 | 53,229 | 216,357 | 25% | |
| OASDI Medicare - Classified | 63,359 | 66,164 | 67,992 | 14,312 | 70,081 | 21% | |
| Health & Welfare Benefits - Certificated | 2,479,545 | 2,479,545 | 2,479,545 | 770,733 | 2,479,545 | 31% | |
| Health & Welfare Benefits - Classified | 1,237,220 | 1,237,220 | 1,237,220 | 347,655 | 1,237,220 | 28% | |
| Unemployment Insurance - Certificated | 17,925 | 17,925 | 17,925 | 3,374 | 17,925 | 19% | |
| Unemployment Insurance - Classified | 7,552 | 7,552 | 7,552 | 1,446 | 7,552 | 19% | |
| Workers' Compensation - Certificated | 137,025 | 137,025 | 137,025 | 48,930 | 137,025 | 36% | |
| Workers' Compensation - Classified | 58,725 | 58,725 | 58,725 | 16,320 | 58,725 | 28% | |
| Other Employment Benefits - Certificated (LT Benefits) | 255,000 | 255,000 | 255,000 | 108,901 | 255,000 | 43% | |
| Other Employment Benefits - Classified (LT Benefits) | 51,000 | 51,000 | 51,000 | 22,205 | 51,000 | 44% | |
| Employee Benefits | 7,844,229 | 8,083,440 | 8,149,796 | 2,193,704 | 8,193,544 | | |
| Total Salary & Benefits | 26,316,845 | 27,026,165 | 27,742,706 | 6,877,368 | 27,947,858 | | |
| | | | | | | | |
| Textbooks | 9,900 | 9,900 | 9,900 | 14,052 | 20,000 | 142% | Credit Recovery Program - budgeted in licenses, paid from textbooks, using LLM funds |
| Instructional Materials | 151,000 | 200,000 | 200,000 | 12,262 | 200,000 | 6% | |
| Instructional Materials - CTE | | 207,000 | 207,000 | 22,607 | 207,000 | 11% | CTE Teacher Allocations |
| Non-capitalized Equipment | 90,680 | 761,728 | 786,728 | 792,377 | 800,000 | 101% | \$25K for Furniture (per Sept B/F meeting) |
| Other Supplies | 167,143 | 189,810 | 189,810 | 17,996 | 189,810 | 9% | |
| Food Service Supplies | 275,304 | 152,597 | 152,597 | 208 | 104,253 | 0% | 3 mos of café operations |
| Books & Supplies | 694,027 | 1,521,035 | 1,546,035 | 859,501 | 1,521,063 | 56% | |
| | | | | | | | |
| Personnel Services-Mileage | 4,197 | 1,000 | 1,000 | 137 | 1,000 | 14% | |
| Travel/Conference | 44,151 | 104,151 | 104,151 | (1,994) | 104,151 | -2% | |
| Due/Memberships (Subscriptions) | 352,074 | 430,391 | 430,391 | 352,577 | 430,391 | 82% | |
| Insurance | 309,969 | 309,969 | 309,969 | 111,965 | 309,969 | 36% | |
| | | | | | | | |
| Operation and Housekeeping Services | 146,000 | 146,000 | 338,000 | 50,501 | 344,700 | 17% | Hybrid estimate for PPE Supplies (3 mos @\$66K, with one time cost of PPE @\$126K, \$2.5K pre hybrid/high risk) |
| Utilities | 426,000 | 426,000 | 426,000 | 80,552 | 426,000 | 19% | |
| Rentals/Leases/Repairs & Noncapitalized Improvements | 576,408 | 574,763 | 574,763 | 291,071 | 574,763 | 51% | |
| | | | | | | | |
| Professional Consulting Services& Operating Exp (5800, 5810, 5821, 5850, 5860) | 3,128,730 | 2,945,043 | 3,125,043 | 476,125 | 2,808,867 | 16% | Assumes 3 mo hybrid model costs for Café, Janitorial, & security |
| Pupil Transportation | 491,348 | 275,913 | 440,913 | 3,735 | 361,518 | 1% | 3 mos hybrid busing + add'l costs @\$165K + at risk busing @\$14K |
| Other Expenses | 92,330 | 92,330 | 92,330 | 14,670 | 92,330 | 16% | |
| Communications | 75,860 | 75,860 | 75,860 | 21,711 | 75,860 | 29% | |
| Services, Other Operating Exp | 5,647,067 | 5,381,420 | 5,918,420 | 1,401,049 | 5,529,549 | 25% | |
| | | | | | | | |
| Capital Outlay (6100-6500) -Total (Detail Below) | 322,866 | 402,866 | 427,866 | 165,987 | 427,866 | 39% | |
| Bldgs & Improvement (6200) | 87,866 | 167,866 | 192,866 | 165,987 | 192,866 | 86% | \$80K approved CapEx + \$87K existing CapEx from pool/permit (per Sept B/F Meeting) |
| Equipment-Technology (6400) | 235,000 | 235,000 | 235,000 | - | 235,000 | 0% | E-rate project |

Palisades Charter High School
2020-2021 First Interim Projections and Actuals until 10/31/2020

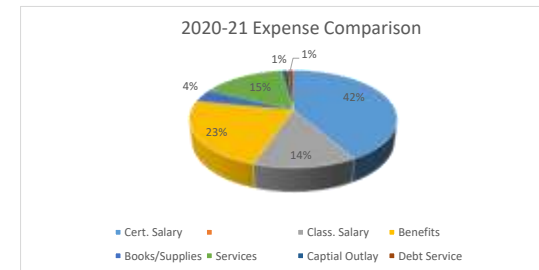
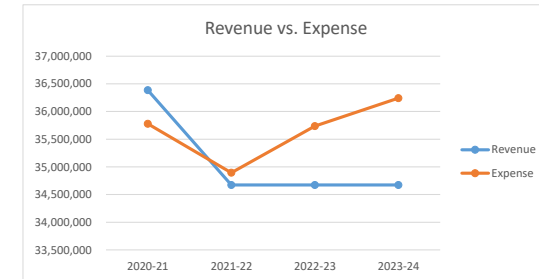
| | 2020-2021 Board Approved Adopted Budget 6/5/2020 | 2020-2021 Revised Budget (E-Learn/Return 2nd Semester, per CA gov 7/30/2020) 8/17/20 | Budget Updates 10/1/2020 (3 months hybrid) | 2020-2021 Actuals to Date 10/31/2020 | 2020-2021 1st Interim Updates | % received/s pent (Budget vs. actuals) | Comments |
|--|--|--|--|--------------------------------------|-------------------------------|--|--|
| Equipment/Furniture Replacement (6500) | | | | | | | |
| Depreciation Expense (Financial reporting basis) | 900,000 | 900,000 | 900,000 | 300,000 | 900,000 | 33% | |
| Interest | 58,338 | 58,338 | 58,338 | 9,707 | 58,338 | 17% | |
| Indirect Cost (Total charter school supervisory oversight fees only) | 271,968 | 295,392 | 295,392 | 100,713 | 295,392 | 34% | |
| Total Expenses-Financial Reporting Basis | 33,888,246 | 35,182,349 | 36,460,891 | 9,548,338 | 36,252,201 | | |
| Total Expenses-Cash Reporting Basis | 33,311,112 | 34,685,215 | 35,988,757 | 9,414,325 | 35,780,067 | | |
| Financial Reporting Basis-Adjusted for Depreciation (before L/T Benefit accrual) | (225,503) | 1,436,029 | 131,728 | 1,791,196 | 133,761 | | Additional potential expenses include budget/finance parking lot items |
| Net Reserve Fund Increase(Reduction)-Cash Basis | 351,631 | 1,933,163 | 603,862 | 1,925,209 | 605,895 | | (Revenue - Expenses: Cash Reporting Basis) |
| Cash Deferrals (State IOU) | 4,207,525 | 6,449,586 | | | | | Cash Deferrals for 20/21 FY (Feb-June 2021), as of 10/1 |
| Additional Financial Lifetime Benefit Accrual Needed to Comply with FASB | 1,228,631 | 1,228,631 | 1,228,631 | 1,403,526 | 1,228,631 | | OPEB Obligation per actuarial report |
| Revised Financial Reporting with OPEB | (1,454,134) | 207,398 | (1,096,903) | 387,670 | (1,094,870) | | Ending Balance w/OPEB Obligation |

Palisades Charter High School Multi-Year Projection: 2020-2021 First Interim and Projections Until 2023-2024

[LINK TO DOCUMENT INDEX](#)

Assumptions made
Subtotals/Totals

| | | 2020-2021: Hybrid 3 Mos - 1st Interim | 2021-2022 | | 2022-2023 | | 2023-2024 | |
|---|-----------|---------------------------------------|-----------------|----------------|-----------------|----------------|-----------------|----------------|
| <u>Revenues</u> | | Totals | % change | Totals | % change | Totals | % change | Totals |
| LCFF | | \$ 29,539,379 | -0.01% | \$ 29,535,120 | 0.00% | \$ 29,535,120 | 0.00% | \$ 29,535,120 |
| Federal Revenue | 8100-8299 | 1,088,918 | 0.00% | 1,088,918 | 0.00% | 1,088,918 | 0.00% | 1,088,918 |
| Other State | 8300-8599 | 941,986 | 0.00% | 941,986 | 0.00% | 941,986 | 0.00% | 941,986 |
| One time/New revenue - Learning Loss/Mitigation Funds, COVID-19 grant, CTEIG funds, PCHS Fund/Fundraising | 8300-8599 | 2,108,525 | -81.03% | 400,000 | 0.00% | 400,000 | 0.00% | 400,000 |
| Local | 8600-8799 | 2,707,154 | 0.00% | 2,707,154 | 0.00% | 2,707,154 | 0.00% | 2,707,154 |
| Total Revenue | | \$ 36,385,962 | -4.71% | \$ 34,673,178 | 0.00% | \$ 34,673,178 | 0.00% | \$ 34,673,178 |
| Change in Revenue | | | | \$ (1,712,784) | | \$ - | | \$ - |
| <u>Expenditures</u> | | | Increase Factor | | Increase Factor | | Increase Factor | |
| Certificated Salaries | | | | | | | | |
| Teachers | | \$ 13,763,147 | 100.0% | \$ 13,763,147 | 100.0% | \$ 13,852,341 | 100.0% | \$ 13,942,078 |
| Admin | | 905,118 | 100.0% | 906,928 | 100.0% | 907,151 | 100.0% | 907,376 |
| step & column | | | 0.8% | 111,493 | 0.8% | 112,172 | 0.8% | 112,856 |
| off schedule | | 252,895 | | | | | | |
| Total Certificated | 1000-1999 | \$ 14,921,160 | | \$ 14,781,567 | 0.61% | \$ 14,871,664 | 0.61% | \$ 14,962,310 |
| Classified | | | | | | | | |
| Base | | 4,350,580 | 100.0% | 4,210,580 | 100.0% | 4,237,572 | 100.0% | 4,264,721 |
| Admin | | 410,452 | 100.0% | 411,273 | 100.0% | 411,340 | 100.0% | 411,408 |
| step & column | | | 0.7% | 33,740 | 0.7% | 33,937 | 0.7% | 34,136 |
| off schedule | | 72,123 | | | | | | |
| Total classified | 2000-2999 | \$ 4,833,155 | -3.67% | \$ 4,655,593 | 0.59% | \$ 4,682,849 | 0.59% | \$ 4,710,265 |
| Stat. benefits - Cert | | | | | | | | |
| STRS | | 2,368,925 | -0.16% | 2,365,051 | 13.81% | 2,691,771 | 0.61% | 2,708,178 |
| Other Certificated Benefits | | 380,307 | 28.26% | 487,792 | 0.61% | 490,765 | 0.61% | 493,756 |
| Stat. benefits - Class | | | | | | | | |
| PERS | | 985,534 | 8.65% | 1,070,786 | 15.02% | 1,231,589 | 4.41% | 1,285,902 |
| Other Classified Benefits | | 436,013 | 1.44% | 442,281 | 0.59% | 444,871 | 0.59% | 447,475 |
| lifetime benefits | | 306,000 | 100.0% | 691,000 | 100.0% | 691,000 | 100.0% | 691,000 |
| Medical benefits | | 3,716,765 | 104.5% | 3,884,019 | 104.5% | 4,058,800 | 104.5% | 4,241,446 |
| Total Benefits | 3000-3999 | \$ 8,193,544 | 9.12% | \$ 8,940,929 | 7.47% | \$ 9,608,796 | 2.70% | \$ 9,867,758 |
| Books & Supplies | 4000-4999 | 1,521,063 | 1.59% | 553,248 | 1.87% | 563,594 | 2.33% | 576,726 |
| Services | 5000-5999 | 5,529,549 | 1.59% | 5,108,469 | 1.87% | 5,203,997 | 2.33% | 5,325,250 |
| Capital Outlay | 6000-6999 | 427,866 | | 500,000 | | 500,000 | | 500,000 |
| Other Outgo | 7100-7299 | | | | | | | |
| Indirect | 7300-7399 | 295,392 | | 295,351 | | 295,351 | | 295,351 |
| Interest/Debt Service | 7400-7499 | 58,338 | | 58,338 | | 11,784 | | 4,731 |
| other uses | 7610-7699 | | | | | | | |
| Total Expenditures, Cash Reporting Basis | | \$ 35,780,067 | -2.48% | \$ 34,893,496 | 2.42% | \$ 35,738,036 | 1.41% | \$ 36,242,392 |
| Change in Expenditures - Cash Basis | | | | (886,571) | | 844,540 | | 504,356 |
| Total Expenditures, Financial Reporting Basis | | 36,252,201 | | 35,293,496 | | 36,163,036 | | 36,692,392 |
| Change in unrestricted fund balance-Cash basis | | \$ 605,895 | | \$ (220,317) | | \$ (1,064,858) | | \$ (1,569,213) |
| Change in expenditures, financial reporting basis | | | | (958,705) | | 869,540 | | 529,356 |
| Depreciation | | \$ 900,000 | | \$ 900,000 | | \$ 925,000 | | \$ 950,000 |



Palisades Charter High School Multi-Year Projection: 2020-2021 First Interim and Projections Until 2023-2024

[LINK TO DOCUMENT INDEX](#)

| Revenues | 2020-2021: Hybrid 3 Mos - 1st Interim | | 2021-2022 | | 2022-2023 | | 2023-2024 | |
|---|---------------------------------------|----------------------|-------------------------------|------------------------------|---------------------------|---------------|----------------|---------------|
| | Totals | % change | Totals | % change | Totals | % change | Totals | % change |
| Fund Balance Change (financial reporting basis, including fixed assets) | \$ 133,761 | | \$ (620,317) | | \$ (1,489,858) | | \$ (2,019,213) | |
| Additional OPEB Reporting Requirement (as required by GASB 75) | \$ 1,228,631 | | \$ 843,631 | | \$ 843,631 | | \$ 843,631 | |
| Fund Balance with OPEB obligation reported | \$ (1,094,870) | | \$ (1,463,948) | | \$ (2,333,489) | | \$ (2,862,844) | |
| salary | \$ 19,754,315 | | \$ 19,437,160 | | \$ 19,554,513 | | \$ 19,672,575 | |
| benefit | \$ 8,193,544 | | \$ 8,940,929 | | \$ 9,608,796 | | \$ 9,867,758 | |
| % benefit to salary | 41.48% | | 46.00% | | 49.14% | | 50.16% | |
| % salary/benefit of expenses | 78.11% | | 81.33% | | 81.60% | | 81.51% | |
| Assumptions to Use (Based on Department of Finance figures) | | | | | | | | |
| STRS | 16.150% | | 16.000% | | 18.100% | | 18.100% | |
| PERS | 20.700% | | 23.000% | | 26.300% | | 27.300% | |
| OASDI | 6.200% | | 6.200% | | 6.200% | | 6.200% | |
| Medicare | 1.450% | | 1.450% | | 1.450% | | 1.450% | |
| SUI | 0.050% | | 0.050% | | 0.050% | | 0.050% | |
| WCI | 1.800% | | 1.800% | | 1.800% | | 1.800% | |
| CPI | 0.98% | | 1.59% | | 1.87% | | 2.33% | |
| Stat COLA | 0.00% | | 0.00% | | 0.00% | | 0.00% | |
| OPEB Liability Amount | \$1,534,631 | | \$1,534,631 | | \$1,534,631 | | \$1,534,631 | |
| Unduplicated Count | 853.00 | | 853.00 | | 853.00 | | 853.00 | |
| LCFF Revenue Calculations | | | | | | | | |
| ADA | ADA %age | Enrollment/ADA (P-2) | Enrollment (lower class size) | Enrollment (Project flat fro | Enrollment (Project Flat) | | | |
| Changes in ADA | | 2,907 | 2,907 | 2,907 | 2,907 | | | |
| | | - | | | | | | |
| | COLA Factor | | 0.00% | 0.00% | 0.00% | | | |
| Per student funding (9-12) Updated | \$ 10,160 | \$ 29,539,184 | \$ 10,160 | \$ 29,535,120 | \$ 10,160 | \$ 29,535,120 | \$ 10,160 | \$ 29,535,120 |
| Total Current Year LCFF Funding | | 29,539,184 | -0.01% | 29,535,120 | 0.00% | 29,535,120 | 0.00% | 29,535,120 |

Palisades Charter High
Los Angeles Unified
Los Angeles County

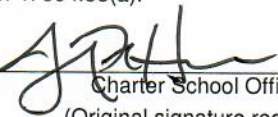
First Interim
Fiscal Year 2020-21
Charter School Certification

19 64733 1995836
Form CI

Charter Number: 037

To the chartering authority and the county superintendent of schools (or only to the county superintendent of schools if the county board of education is the chartering authority):

2020-21 CHARTER SCHOOL INTERIM REPORT: This report is hereby filed by the charter school pursuant to Education Code Section 47604.33(a).

Signed: 
Charter School Official
(Original signature required)

Date: 11/30/2020

Printed Name: Juan Pablo Herrera

Title: Chief Business Officer

For additional information on the interim report, please contact:

Charter School Contact:

Juan Pablo Herrera

Name

Chief Business Officer

Title

310-230-7238

Telephone

jherrera@palihigh.org

E-mail Address

G = General Ledger Data; S = Supplemental Data

| Form | Description | Data Supplied For: | | | |
|-------|---|-------------------------------|---|-------------------------------|--------------------------------|
| | | 2020-21 Original Budget | 2020-21 Board Approved Operating Budget | 2020-21 Actuals to Date | 2020-21 Projected Totals |
| 011 | General Fund/County School Service Fund | | | | |
| 081 | Student Activity Special Revenue Fund | | | | |
| 111 | Adult Education Fund | | | | |
| 121 | Child Development Fund | | | | |
| 131 | Cafeteria Special Revenue Fund | | | | |
| 141 | Deferred Maintenance Fund | | | | |
| 151 | Pupil Transportation Equipment Fund | | | | |
| 171 | Special Reserve Fund for Other Than Capital Outlay Projects | | | | |
| 181 | School Bus Emissions Reduction Fund | | | | |
| 191 | Foundation Special Revenue Fund | | | | |
| 201 | Special Reserve Fund for Postemployment Benefits | | | | |
| 211 | Building Fund | | | | |
| 251 | Capital Facilities Fund | | | | |
| 301 | State School Building Lease-Purchase Fund | | | | |
| 351 | County School Facilities Fund | | | | |
| 401 | Special Reserve Fund for Capital Outlay Projects | | | | |
| 491 | Capital Project Fund for Blended Component Units | | | | |
| 511 | Bond Interest and Redemption Fund | | | | |
| 521 | Debt Service Fund for Blended Component Units | | | | |
| 531 | Tax Override Fund | | | | |
| 561 | Debt Service Fund | | | | |
| 571 | Foundation Permanent Fund | | | | |
| 611 | Cafeteria Enterprise Fund | | | | |
| 621 | Charter Schools Enterprise Fund | G | G | G | G |
| 631 | Other Enterprise Fund | | | | |
| 661 | Warehouse Revolving Fund | | | | |
| 671 | Self-Insurance Fund | | | | |
| 711 | Retiree Benefit Fund | | | | |
| 731 | Foundation Private-Purpose Trust Fund | | | | |
| 761 | Warrant/Pass-Through Fund | | | | |
| 951 | Student Body Fund | | | | |
| AI | Average Daily Attendance | | | | |
| CASH | Cashflow Worksheet | | | | |
| CHG | Change Order Form | | | | |
| CI | Interim Certification | | | | |
| ESMOE | Every Student Succeeds Act Maintenance of Effort | | | | G |
| ICR | Indirect Cost Rate Worksheet | | | | |
| SIAI | Summary of Interfund Activities - Projected Year Totals | | | | |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|---|----------------|-------------------------|---------------------|-------------------------------------|---------------------|---------------------------|----------------------------|-------------------------|
| A. REVENUES | | | | | | | | |
| 1) LCFF Sources | | 8010-8099 | 27,196,847.00 | 27,196,847.00 | 8,607,190.50 | 29,539,379.00 | 2,342,532.00 | 8.6% |
| 2) Federal Revenue | | 8100-8299 | 1,653,358.00 | 1,653,358.00 | 1,347,306.37 | 2,534,912.00 | 881,554.00 | 53.3% |
| 3) Other State Revenue | | 8300-8599 | 969,722.00 | 969,722.00 | 468,280.86 | 1,204,517.00 | 234,795.00 | 24.2% |
| 4) Other Local Revenue | | 8600-8799 | 3,842,816.00 | 3,842,816.00 | 916,756.30 | 3,107,154.00 | (735,662.00) | -19.1% |
| 5) TOTAL, REVENUES | | | 33,662,743.00 | 33,662,743.00 | 11,339,534.03 | 36,385,962.00 | | |
| B. EXPENSES | | | | | | | | |
| 1) Certificated Salaries | | 1000-1999 | 14,103,004.00 | 14,103,004.00 | 3,694,697.84 | 14,921,160.40 | (818,156.40) | -5.8% |
| 2) Classified Salaries | | 2000-2999 | 4,369,612.00 | 4,369,612.00 | 988,965.28 | 4,833,155.00 | (463,543.00) | -10.6% |
| 3) Employee Benefits | | 3000-3999 | 7,844,229.00 | 7,844,229.00 | 2,193,703.74 | 8,193,544.00 | (349,315.00) | -4.5% |
| 4) Books and Supplies | | 4000-4999 | 694,027.00 | 694,027.00 | 859,501.25 | 1,521,063.00 | (827,036.00) | -119.2% |
| 5) Services and Other Operating Expenses | | 5000-5999 | 5,647,068.00 | 5,647,068.00 | 1,401,048.90 | 5,529,550.00 | 117,518.00 | 2.1% |
| 6) Depreciation | | 6000-6999 | 900,000.00 | 900,000.00 | 300,000.00 | 900,000.00 | 0.00 | 0.0% |
| 7) Other Outgo (excluding Transfers of Indirect Costs) | | 7100-7299, 7400-7499 | 330,306.00 | 330,306.00 | 110,420.34 | 353,730.00 | (23,424.00) | -7.1% |
| 8) Other Outgo - Transfers of Indirect Costs | | 7300-7399 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| 9) TOTAL, EXPENSES | | | 33,888,246.00 | 33,888,246.00 | 9,548,337.35 | 36,252,202.40 | | |
| C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9) | | | (225,503.00) | (225,503.00) | 1,791,196.68 | 133,759.60 | | |
| D. OTHER FINANCING SOURCES/USES | | | | | | | | |
| 1) Interfund Transfers | | | | | | | | |
| a) Transfers In | | 8900-8929 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| b) Transfers Out | | 7600-7629 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| 2) Other Sources/Uses | | | | | | | | |
| a) Sources | | 8930-8979 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| b) Uses | | 7630-7699 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| 3) Contributions | | 8980-8999 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| 4) TOTAL, OTHER FINANCING SOURCES/USES | | | 0.00 | 0.00 | 0.00 | 0.00 | | |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|--|----------------|--------------|------------------------|---|------------------------|---------------------------------|----------------------------------|----------------------------------|
| E. NET INCREASE (DECREASE) IN NET POSITION (C + D4) | | | (225,503.00) | (225,503.00) | 1,791,196.68 | 133,759.60 | | |
| F. NET POSITION | | | | | | | | |
| 1) Beginning Net Position | | | | | | | | |
| a) As of July 1 - Unaudited | | 9791 | (5,435,035.36) | (5,435,035.36) | | (5,435,035.36) | 0.00 | 0.0% |
| b) Audit Adjustments | | 9793 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.0% |
| c) As of July 1 - Audited (F1a + F1b) | | | (5,435,035.36) | (5,435,035.36) | | (5,435,035.36) | | |
| d) Other Restatements | | 9795 | 0.00 | 0.00 | | 0.00 | 0.00 | 0.0% |
| e) Adjusted Beginning Net Position (F1c + F1d) | | | (5,435,035.36) | (5,435,035.36) | | (5,435,035.36) | | |
| 2) Ending Net Position, June 30 (E + F1e) | | | (5,660,538.36) | (5,660,538.36) | | (5,301,275.76) | | |
| Components of Ending Net Position | | | | | | | | |
| a) Net Investment in Capital Assets | | 9796 | 0.00 | 0.00 | | 0.00 | | |
| b) Restricted Net Position | | 9797 | 0.00 | 0.00 | | 0.00 | | |
| c) Unrestricted Net Position | | 9790 | (5,660,538.36) | (5,660,538.36) | | (5,301,275.76) | | |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|--|--|--------------|----------------------|-------------------------------------|---------------------|---------------------------|----------------------------|-------------------------|
| LCFF SOURCES | | | | | | | | |
| Principal Apportionment | | | | | | | | |
| State Aid - Current Year | | 8011 | 15,339,022.00 | 15,339,022.00 | 4,078,443.50 | 14,565,870.00 | (773,152.00) | -5.0% |
| Education Protection Account State Aid - Current Year | | 8012 | 4,732,251.00 | 4,732,251.00 | 1,639,592.00 | 6,558,368.00 | 1,826,117.00 | 38.6% |
| State Aid - Prior Years | | 8019 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| LCFF Transfers | | | | | | | | |
| Unrestricted LCFF Transfers - Current Year | 0000 | 8091 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other LCFF Transfers - Current Year | All Other | 8091 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Transfers to Charter Schools in Lieu of Property Taxes | | 8096 | 7,125,574.00 | 7,125,574.00 | 2,889,155.00 | 8,415,141.00 | 1,289,567.00 | 18.1% |
| Property Taxes Transfers | | 8097 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| LCFF/Revenue Limit Transfers - Prior Years | | 8099 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, LCFF SOURCES | | | 27,196,847.00 | 27,196,847.00 | 8,607,190.50 | 29,539,379.00 | 2,342,532.00 | 8.6% |
| FEDERAL REVENUE | | | | | | | | |
| Maintenance and Operations | | 8110 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Special Education Entitlement | | 8181 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Special Education Discretionary Grants | | 8182 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Child Nutrition Programs | | 8220 | 322,006.00 | 322,006.00 | 276.38 | 48,301.00 | (273,705.00) | -85.0% |
| Donated Food Commodities | | 8221 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Interagency Contracts Between LEAs | | 8285 | 602,592.00 | 602,592.00 | 204,900.99 | 602,592.00 | 0.00 | 0.0% |
| Title I, Part A, Basic | 3010 | 8290 | 315,175.00 | 315,175.00 | 0.00 | 293,836.00 | (21,339.00) | -6.8% |
| Title I, Part D, Local Delinquent Programs | 3025 | 8290 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Title II, Part A, Supporting Effective Instruction | 4035 | 8290 | 62,303.00 | 62,303.00 | 0.00 | 56,571.00 | (5,732.00) | -9.2% |
| Title III, Part A, Immigrant Student Program | 4201 | 8290 | 3,535.00 | 3,535.00 | 0.00 | 3,560.00 | 25.00 | 0.7% |
| Title III, Part A, English Learner Program | 4203 | 8290 | 2,526.00 | 2,526.00 | 0.00 | 3,546.00 | 1,020.00 | 40.4% |
| Public Charter Schools Grant Program (PCSGP) | 4610 | 8290 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Other NCLB / Every Student Succeeds Act | 3020, 3040, 3041, 3045, 3060, 3061, 3150, 3155, 3180, 3181, 3182, 3185, 4037, 4124, 4126, 4127, 4128, 5510, 5630 | 8290 | 23,337.00 | 23,337.00 | 0.00 | 23,410.00 | 73.00 | 0.3% |
| Career and Technical Education | 3500-3599 | 8290 | 37,102.00 | 37,102.00 | 0.00 | 37,102.00 | 0.00 | 0.0% |
| All Other Federal Revenue | All Other | 8290 | 284,782.00 | 284,782.00 | 1,142,129.00 | 1,465,994.00 | 1,181,212.00 | 414.8% |
| TOTAL, FEDERAL REVENUE | | | 1,653,358.00 | 1,653,358.00 | 1,347,306.37 | 2,534,912.00 | 881,554.00 | 53.3% |
| OTHER STATE REVENUE | | | | | | | | |
| Other State Apportionments | | | | | | | | |
| Special Education Master Plan Current Year | 6500 | 8311 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Prior Years | 6500 | 8319 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other State Apportionments - Current Year | All Other | 8311 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other State Apportionments - Prior Years | All Other | 8319 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Child Nutrition Programs | | 8520 | 27,050.00 | 27,050.00 | 21.50 | 4,104.00 | (22,946.00) | -84.8% |
| Mandated Costs Reimbursements | | 8550 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Lottery - Unrestricted and Instructional Materials | | 8560 | 601,749.00 | 601,749.00 | 0.00 | 578,573.00 | (23,176.00) | -3.9% |
| After School Education and Safety (ASES) | 6010 | 8590 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|---|----------------|--------------|----------------------|-------------------------------------|----------------------|---------------------------|----------------------------|-------------------------|
| Charter School Facility Grant | 6030 | 8590 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Drug/Alcohol/Tobacco Funds | 6690, 6695 | 8590 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| California Clean Energy Jobs Act | 6230 | 8590 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Career Technical Education Incentive Grant Program | 6387 | 8590 | 192,599.00 | 192,599.00 | 205,728.54 | 223,040.00 | 30,441.00 | 15.8% |
| Specialized Secondary | 7370 | 8590 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other State Revenue | All Other | 8590 | 148,324.00 | 148,324.00 | 262,530.82 | 398,800.00 | 250,476.00 | 168.9% |
| TOTAL, OTHER STATE REVENUE | | | 969,722.00 | 969,722.00 | 468,280.86 | 1,204,517.00 | 234,795.00 | 24.2% |
| OTHER LOCAL REVENUE | | | | | | | | |
| Sales | | | | | | | | |
| Sale of Equipment/Supplies | | 8631 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Sale of Publications | | 8632 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Food Service Sales | | 8634 | 269,348.00 | 269,348.00 | 0.00 | 40,402.00 | (228,946.00) | -85.0% |
| All Other Sales | | 8639 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Leases and Rentals | | 8650 | 911,000.00 | 911,000.00 | 71,619.94 | 504,284.00 | (406,716.00) | -44.6% |
| Interest | | 8660 | 129,459.00 | 129,459.00 | 10,100.93 | 129,459.00 | 0.00 | 0.0% |
| Net Increase (Decrease) in the Fair Value of Investments | | 8662 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Fees and Contracts | | | | | | | | |
| Child Development Parent Fees | | 8673 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Transportation Fees From Individuals | | 8675 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Interagency Services | | 8677 | 1,908,009.00 | 1,908,009.00 | 648,785.00 | 1,908,009.00 | 0.00 | 0.0% |
| All Other Fees and Contracts | | 8689 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Other Local Revenue | | | | | | | | |
| All Other Local Revenue | | 8699 | 625,000.00 | 625,000.00 | 186,250.43 | 525,000.00 | (100,000.00) | -16.0% |
| Tuition | | 8710 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other Transfers In | | 8781-8783 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Transfers of Apportionments | | | | | | | | |
| Special Education SELPA Transfers From Districts or Charter Schools | 6500 | 8791 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| From County Offices | 6500 | 8792 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| From JPAs | 6500 | 8793 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Other Transfers of Apportionments From Districts or Charter Schools | All Other | 8791 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| From County Offices | All Other | 8792 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| From JPAs | All Other | 8793 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other Transfers In from All Others | | 8799 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, OTHER LOCAL REVENUE | | | 3,842,816.00 | 3,842,816.00 | 916,756.30 | 3,107,154.00 | (735,662.00) | -19.1% |
| TOTAL, REVENUES | | | 33,662,743.00 | 33,662,743.00 | 11,339,534.03 | 36,385,962.00 | | |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|---|----------------|--------------|----------------------|-------------------------------------|---------------------|---------------------------|----------------------------|-------------------------|
| CERTIFICATED SALARIES | | | | | | | | |
| Certificated Teachers' Salaries | | 1100 | 13,197,886.00 | 13,197,886.00 | 3,443,192.30 | 14,016,042.40 | (818,156.40) | -6.2% |
| Certificated Pupil Support Salaries | | 1200 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Certificated Supervisors' and Administrators' Salaries | | 1300 | 905,118.00 | 905,118.00 | 251,505.54 | 905,118.00 | 0.00 | 0.0% |
| Other Certificated Salaries | | 1900 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, CERTIFICATED SALARIES | | | 14,103,004.00 | 14,103,004.00 | 3,694,697.84 | 14,921,160.40 | (818,156.40) | -5.8% |
| CLASSIFIED SALARIES | | | | | | | | |
| Classified Instructional Salaries | | 2100 | 930,455.00 | 930,455.00 | 163,904.41 | 930,455.00 | 0.00 | 0.0% |
| Classified Support Salaries | | 2200 | 160,886.00 | 160,886.00 | 38,794.97 | 160,886.00 | 0.00 | 0.0% |
| Classified Supervisors' and Administrators' Salaries | | 2300 | 410,452.00 | 410,452.00 | 122,607.24 | 410,452.00 | 0.00 | 0.0% |
| Clerical, Technical and Office Salaries | | 2400 | 1,940,764.00 | 1,940,764.00 | 446,110.82 | 2,072,527.00 | (131,763.00) | -6.8% |
| Other Classified Salaries | | 2900 | 927,055.00 | 927,055.00 | 217,547.84 | 1,258,835.00 | (331,780.00) | -35.8% |
| TOTAL, CLASSIFIED SALARIES | | | 4,369,612.00 | 4,369,612.00 | 988,965.28 | 4,833,155.00 | (463,543.00) | -10.6% |
| EMPLOYEE BENEFITS | | | | | | | | |
| STRS | | 3101-3102 | 2,277,635.00 | 2,277,635.00 | 571,564.48 | 2,368,925.00 | (91,290.00) | -4.0% |
| PERS | | 3201-3202 | 768,833.00 | 768,833.00 | 172,655.08 | 985,534.00 | (216,701.00) | -28.2% |
| OASDI/Medicare/Alternative | | 3301-3302 | 553,769.00 | 553,769.00 | 129,922.00 | 595,093.00 | (41,324.00) | -7.5% |
| Health and Welfare Benefits | | 3401-3402 | 3,716,765.00 | 3,716,765.00 | 1,118,387.34 | 3,716,765.00 | 0.00 | 0.0% |
| Unemployment Insurance | | 3501-3502 | 25,477.00 | 25,477.00 | 4,819.44 | 25,477.00 | 0.00 | 0.0% |
| Workers' Compensation | | 3601-3602 | 195,750.00 | 195,750.00 | 65,250.00 | 195,750.00 | 0.00 | 0.0% |
| OPEB, Allocated | | 3701-3702 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| OPEB, Active Employees | | 3751-3752 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Other Employee Benefits | | 3901-3902 | 306,000.00 | 306,000.00 | 131,105.40 | 306,000.00 | 0.00 | 0.0% |
| TOTAL, EMPLOYEE BENEFITS | | | 7,844,229.00 | 7,844,229.00 | 2,193,703.74 | 8,193,544.00 | (349,315.00) | -4.5% |
| BOOKS AND SUPPLIES | | | | | | | | |
| Approved Textbooks and Core Curricula Materials | | 4100 | 9,900.00 | 9,900.00 | 14,052.27 | 20,000.00 | (10,100.00) | -102.0% |
| Books and Other Reference Materials | | 4200 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Materials and Supplies | | 4300 | 318,143.00 | 318,143.00 | 30,257.48 | 389,810.00 | (71,667.00) | -22.5% |
| Noncapitalized Equipment | | 4400 | 90,680.00 | 90,680.00 | 814,984.00 | 1,007,000.00 | (916,320.00) | -1010.5% |
| Food | | 4700 | 275,304.00 | 275,304.00 | 207.50 | 104,253.00 | 171,051.00 | 62.1% |
| TOTAL, BOOKS AND SUPPLIES | | | 694,027.00 | 694,027.00 | 859,501.25 | 1,521,063.00 | (827,036.00) | -119.2% |
| SERVICES AND OTHER OPERATING EXPENSES | | | | | | | | |
| Subagreements for Services | | 5100 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Travel and Conferences | | 5200 | 48,348.00 | 48,348.00 | (1,857.49) | 105,151.00 | (56,803.00) | -117.5% |
| Dues and Memberships | | 5300 | 352,074.00 | 352,074.00 | 352,576.55 | 430,391.00 | (78,317.00) | -22.2% |
| Insurance | | 5400-5450 | 309,969.00 | 309,969.00 | 111,965.00 | 309,969.00 | 0.00 | 0.0% |
| Operations and Housekeeping Services | | 5500 | 572,000.00 | 572,000.00 | 131,053.18 | 770,700.00 | (198,700.00) | -34.7% |
| Rentals, Leases, Repairs, and Noncapitalized Improvements | | 5600 | 576,408.00 | 576,408.00 | 291,071.36 | 574,763.00 | 1,645.00 | 0.3% |
| Transfers of Direct Costs | | 5710 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Transfers of Direct Costs - Interfund | | 5750 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Professional/Consulting Services and Operating Expenditures | | 5800 | 3,712,408.00 | 3,712,408.00 | 494,529.41 | 3,262,715.00 | 449,693.00 | 12.1% |
| Communications | | 5900 | 75,861.00 | 75,861.00 | 21,710.89 | 75,861.00 | 0.00 | 0.0% |
| TOTAL, SERVICES AND OTHER OPERATING EXPENSES | | | 5,647,068.00 | 5,647,068.00 | 1,401,048.90 | 5,529,550.00 | 117,518.00 | 2.1% |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|--|----------------|--------------|------------------------|---|------------------------|---------------------------------|----------------------------------|----------------------------------|
| DEPRECIATION | | | | | | | | |
| Depreciation Expense | | 6900 | 900,000.00 | 900,000.00 | 300,000.00 | 900,000.00 | 0.00 | 0.0% |
| TOTAL, DEPRECIATION | | | 900,000.00 | 900,000.00 | 300,000.00 | 900,000.00 | 0.00 | 0.0% |
| OTHER OUTGO (excluding Transfers of Indirect Costs) | | | | | | | | |
| Tuition | | | | | | | | |
| Tuition for Instruction Under Interdistrict Attendance Agreements | | 7110 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Tuition, Excess Costs, and/or Deficit Payments Payments to Districts or Charter Schools | | 7141 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Payments to County Offices | | 7142 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Payments to JPAs | | 7143 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Other Transfers Out | | | | | | | | |
| All Other Transfers | | 7281-7283 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other Transfers Out to All Others | | 7299 | 271,968.00 | 271,968.00 | 100,713.00 | 295,392.00 | (23,424.00) | -8.6% |
| Debt Service | | | | | | | | |
| Debt Service - Interest | | 7438 | 58,338.00 | 58,338.00 | 9,707.34 | 58,338.00 | 0.00 | 0.0% |
| TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs) | | | 330,306.00 | 330,306.00 | 110,420.34 | 353,730.00 | (23,424.00) | -7.1% |
| OTHER OUTGO - TRANSFERS OF INDIRECT COSTS | | | | | | | | |
| Transfers of Indirect Costs | | 7310 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Transfers of Indirect Costs - Interfund | | 7350 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, EXPENSES | | | 33,888,246.00 | 33,888,246.00 | 9,548,337.35 | 36,252,202.40 | | |

| Description | Resource Codes | Object Codes | Original Budget (A) | Board Approved Operating Budget (B) | Actuals To Date (C) | Projected Year Totals (D) | Difference (Col B & D) (E) | % Diff Column B & D (F) |
|---|----------------|--------------|------------------------|---|------------------------|---------------------------------|----------------------------------|----------------------------------|
| INTERFUND TRANSFERS | | | | | | | | |
| INTERFUND TRANSFERS IN | | | | | | | | |
| Other Authorized Interfund Transfers In | | 8919 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| (a) TOTAL, INTERFUND TRANSFERS IN | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| INTERFUND TRANSFERS OUT | | | | | | | | |
| Other Authorized Interfund Transfers Out | | 7619 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| (b) TOTAL, INTERFUND TRANSFERS OUT | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| OTHER SOURCES/USES | | | | | | | | |
| SOURCES | | | | | | | | |
| Other Sources | | | | | | | | |
| Transfers from Funds of Lapsed/Reorganized LEAs | | 8965 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other Financing Sources | | 8979 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| (c) TOTAL, SOURCES | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| USES | | | | | | | | |
| Transfers of Funds from Lapsed/Reorganized LEAs | | 7651 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| All Other Financing Uses | | 7699 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| (d) TOTAL, USES | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| CONTRIBUTIONS | | | | | | | | |
| Contributions from Unrestricted Revenues | | 8980 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| Contributions from Restricted Revenues | | 8990 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| (e) TOTAL, CONTRIBUTIONS | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% |
| TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e) | | | 0.00 | 0.00 | 0.00 | 0.00 | | |

| Description | ESTIMATED FUNDED ADA Original Budget (A) | ESTIMATED FUNDED ADA Board Approved Operating Budget (B) | ESTIMATED P-2 REPORT ADA Projected Year Totals (C) | ESTIMATED FUNDED ADA Projected Year Totals (D) | DIFFERENCE (Col. D - B) (E) | PERCENTAGE DIFFERENCE (Col. E / B) (F) |
|---|--|--|--|--|-----------------------------|--|
| C. CHARTER SCHOOL ADA | | | | | | |
| Authorizing LEAs reporting charter school SACS financial data in their Fund 01, 09, or 62 use this worksheet to report ADA for those charter schools. Charter schools reporting SACS financial data separately from their authorizing LEAs in Fund 01 or Fund 62 use this worksheet to report their ADA. | | | | | | |
| FUND 01: Charter School ADA corresponding to SACS financial data reported in Fund 01. | | | | | | |
| 1. Total Charter School Regular ADA | 2,907.00 | 2,907.00 | 2,907.00 | 2,907.00 | 0.00 | 0% |
| 2. Charter School County Program Alternative Education ADA | | | | | | |
| a. County Group Home and Institution Pupils | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| b. Juvenile Halls, Homes, and Camps | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)] | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C2a through C2c) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 3. Charter School Funded County Program ADA | | | | | | |
| a. County Community Schools | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| b. Special Education-Special Day Class | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| c. Special Education-NPS/LCI | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| d. Special Education Extended Year | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| f. Total, Charter School Funded County Program ADA (Sum of Lines C3a through C3e) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 4. TOTAL CHARTER SCHOOL ADA (Sum of Lines C1, C2d, and C3f) | 2,907.00 | 2,907.00 | 2,907.00 | 2,907.00 | 0.00 | 0% |
| FUND 09 or 62: Charter School ADA corresponding to SACS financial data reported in Fund 09 or Fund 62. | | | | | | |
| 5. Total Charter School Regular ADA | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 6. Charter School County Program Alternative Education ADA | | | | | | |
| a. County Group Home and Institution Pupils | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| b. Juvenile Halls, Homes, and Camps | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)] | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C6a through C6c) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 7. Charter School Funded County Program ADA | | | | | | |
| a. County Community Schools | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| b. Special Education-Special Day Class | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| c. Special Education-NPS/LCI | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| d. Special Education Extended Year | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| f. Total, Charter School Funded County Program ADA (Sum of Lines C7a through C7e) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 8. TOTAL CHARTER SCHOOL ADA (Sum of Lines C5, C6d, and C7f) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0% |
| 9. TOTAL CHARTER SCHOOL ADA Reported in Fund 01, 09, or 62 (Sum of Lines C4 and C8) | 2,907.00 | 2,907.00 | 2,907.00 | 2,907.00 | 0.00 | 0% |

Palisades Charter High
 Los Angeles Unified
 Los Angeles County

First Interim
 2020-21 Projected Year Totals
 Every Student Succeeds Act Maintenance of Effort Expenditures

19 64733 1995836
 Form ESMOE

| Section I - Expenditures | Funds 01, 09, and 62 | | | 2020-21 Expenditures |
|---|---|---------------------------------|--------------------------------------|----------------------|
| | Goals | Functions | Objects | |
| A. Total state, federal, and local expenditures (all resources) | All | All | 1000-7999 | 36,252,202.40 |
| B. Less all federal expenditures not allowed for MOE (Resources 3000-5999, except 3385) | All | All | 1000-7999 | 2,186,947.56 |
| C. Less state and local expenditures not allowed for MOE: (All resources, except federal as identified in Line B) | | | | |
| 1. Community Services | All | 5000-5999 | 1000-7999 | 0.00 |
| 2. Capital Outlay | All except 7100-7199 | All except 5000-5999 | 6000-6999 | 900,000.00 |
| 3. Debt Service | All | 9100 | 5400-5450, 5800, 7430-7439 | 58,338.00 |
| 4. Other Transfers Out | All | 9200 | 7200-7299 | 295,392.00 |
| 5. Interfund Transfers Out | All | 9300 | 7600-7629 | 0.00 |
| 6. All Other Financing Uses | All | 9100 9200 | 7699 7651 | 0.00 |
| 7. Nonagency | 7100-7199 | All except 5000-5999, 9000-9999 | 1000-7999 | 5,015,434.00 |
| 8. Tuition (Revenue, in lieu of expenditures, to approximate costs of services for which tuition is received) | All | All | 8710 | 0.00 |
| 9. Supplemental expenditures made as a result of a Presidentially declared disaster | Manually entered. Must not include expenditures in lines B, C1-C8, D1, or D2. | | | |
| 10. Total state and local expenditures not allowed for MOE calculation (Sum lines C1 through C9) | | | | 6,269,164.00 |
| D. Plus additional MOE expenditures: | | | | |
| 1. Expenditures to cover deficits for food services (Funds 13 and 61) (If negative, then zero) | All | All | 1000-7143, 7300-7439 minus 8000-8699 | 0.00 |
| 2. Expenditures to cover deficits for student body activities | Manually entered. Must not include expenditures in lines A or D1. | | | |
| E. Total expenditures subject to MOE (Line A minus lines B and C10, plus lines D1 and D2) | | | | 27,796,090.84 |

Palisades Charter High
Los Angeles Unified
Los Angeles County

First Interim
2020-21 Projected Year Totals
Every Student Succeeds Act Maintenance of Effort Expenditures

19 64733 1995836
Form ESMOE

| Section II - Expenditures Per ADA | | 2020-21 Annual ADA/ Exps. Per ADA |
|--|---------------|--|
| A. Average Daily Attendance (Form AI, Column C, Line C9)* | | 2,907.00 |
| B. Expenditures per ADA (Line I.E divided by Line II.A) | | 9,561.78 |
| Section III - MOE Calculation (For data collection only. Final determination will be done by CDE) | | |
| | Total | Per ADA |
| A. Base expenditures (Preloaded expenditures extracted from prior year Unaudited Actuals MOE Calculation) (Note: If the prior year MOE was not met, in its final determination, CDE will adjust the prior year base to 90 percent of the preceding prior year amount rather than the actual prior year expenditure amount.) | 26,960,012.95 | 9,274.17 |
| 1. Adjustment to base expenditure and expenditure per ADA amounts for LEAs failing prior year MOE calculation (From Section IV) | 0.00 | 0.00 |
| 2. Total adjusted base expenditure amounts (Line A plus Line A.1) | 26,960,012.95 | 9,274.17 |
| B. Required effort (Line A.2 times 90%) | 24,264,011.66 | 8,346.75 |
| C. Current year expenditures (Line I.E and Line II.B) | 27,796,090.84 | 9,561.78 |
| D. MOE deficiency amount, if any (Line B minus Line C) (If negative, then zero) | 0.00 | 0.00 |
| E. MOE determination (If one or both of the amounts in line D are zero, the MOE requirement is met; if both amounts are positive, the MOE requirement is not met. If either column in Line A.2 or Line C equals zero, the MOE calculation is incomplete.) | MOE Met | |
| F. MOE deficiency percentage, if MOE not met; otherwise, zero (Line D divided by Line B) (Funding under ESSA covered programs in FY 2022-23 may be reduced by the lower of the two percentages) | 0.00% | 0.00% |

*Interim Periods - Annual ADA not available from Form AI. For your convenience, Projected Year Totals Estimated P-2 Report ADA has been preloaded. Manual adjustment may be required to reflect estimated Annual ADA.

Palisades Charter High
 Los Angeles Unified
 Los Angeles County

First Interim
 2020-21 Projected Year Totals
 Every Student Succeeds Act Maintenance of Effort Expenditures

19 64733 1995836
 Form ESMOE

| SECTION IV - Detail of Adjustments to Base Expenditures (used in Section III, Line A.1) | | |
|--|---------------------------|-----------------------------|
| Description of Adjustments | Total Expenditures | Expenditures Per ADA |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total adjustments to base expenditures | 0.00 | 0.00 |

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First Interim
 2020-21 Original Budget
 Technical Review Checks

Palisades Charter High
 Los Angeles Unified

Los Angeles County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

- CHECKFUND - (F) - All FUND codes must be valid. PASSED
- CHK-FUND09-ACTIVITY - (F) - There is no activity in Fund 09. PASSED
- CHECKRESOURCE - (W) - All RESOURCE codes must be valid. PASSED
- CHK-RS-LOCAL-DEFINED - (F) - All locally defined resource codes must roll up to a CDE defined resource code. PASSED
- CHECKGOAL - (F) - All GOAL codes must be valid. PASSED
- CHECKFUNCTION - (F) - All FUNCTION codes must be valid. PASSED
- CHECKOBJECT - (F) - All OBJECT codes must be valid. PASSED
- CHK-FUNDxOBJECT - (F) - All FUND and OBJECT account code combinations must be valid. PASSED
- CHK-FDxRS7690x8590 - (F) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. PASSED
- CHK-FUNDxRESOURCE - (W) - All FUND and RESOURCE account code combinations should be valid. PASSED
- CHK-FUNDxGOAL - (W) - All FUND and GOAL account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-A - (W) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-B - (F) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. PASSED
- CHK-RESOURCExOBJECTA - (W) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RESOURCExOBJECTB - (O) - All RESOURCE and OBJECT (objects 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RES6500xOBJ8091 - (F) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). PASSED

CHK-FUNCTIONxOBJECT - (F) - All FUNCTION and OBJECT account code combinations must be valid. PASSED

CHK-GOALxFUNCTION-A - (F) - Goal and function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. PASSED

CHK-GOALxFUNCTION-B - (F) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). PASSED

SPECIAL-ED-GOAL - (F) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3312, 3318, and 3332. PASSED

GENERAL LEDGER CHECKS

INTERFD-DIR-COST - (W) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. PASSED

INTERFD-INDIRECT - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. PASSED

INTERFD-INDIRECT-FN - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. PASSED

INTERFD-IN-OUT - (W) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). PASSED

LCFF-TRANSFER - (W) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. PASSED

INTRA-FD-DIR-COST - (F) - Transfers of Direct Costs (Object 5710) must net to zero by fund. PASSED

INTRA-FD-INDIRECT - (F) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. PASSED

INTRA-FD-INDIRECT-FN - (F) - Transfers of Indirect Costs (Object 7310) must net to zero by function. PASSED

CONTRIB-UNREST-REV - (F) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. PASSED

CONTRIB-RESTR-REV - (F) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. PASSED

EPA-CONTRIB - (F) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). PASSED

LOTTERY-CONTRIB - (F) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). PASSED

PASS-THRU-REV=EXP - (W) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by resource. PASSED

SE-PASS-THRU-REVENUE - (W) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. PASSED

EXCESS-ASSIGN-REU - (F) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). PASSED

UNASSIGNED-NEGATIVE - (F) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. PASSED

UNR-NET-POSITION-NEG - (F) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. PASSED

RS-NET-POSITION-ZERO - (F) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. PASSED

EFB-POSITIVE - (W) - Ending balance (Object 979Z) is negative for the following resources. Please explain the cause of the negative balances and your plan to resolve them. EXCEPTION

| FUND | RESOURCE | NEG. EFB |
|--|----------|---------------|
| 62 | 0000 | -5,660,536.36 |
| Explanation:OPEB Liability is part of the beginning balance. | | |
| Total of negative resource balances for Fund 62 | | -5,660,536.36 |

OBJ-POSITIVE - (W) - The following objects have a negative balance by resource, by fund: EXCEPTION

| FUND | RESOURCE | OBJECT | VALUE |
|--|----------|--------|---------------|
| 62 | 0000 | 9790 | -5,660,536.36 |
| Explanation:OPEB Liability is part of the beginning balance. | | | |

REV-POSITIVE - (W) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund. PASSED

EXP-POSITIVE - (W) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund. PASSED

CEFB-POSITIVE - (F) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund.
PASSED

SUPPLEMENTAL CHECKS

EXPORT CHECKS

CHK-DEPENDENCY - (F) - If data have changed that affect other forms, the affected forms must be opened and saved.
PASSED

Checks Completed.

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First Interim
 2020-21 Board Approved Operating Budget
 Technical Review Checks

Palisades Charter High
 Los Angeles Unified

Los Angeles County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

- CHECKFUND - (F) - All FUND codes must be valid. PASSED
- CHK-FUND09-ACTIVITY - (F) - There is no activity in Fund 09. PASSED
- CHECKRESOURCE - (W) - All RESOURCE codes must be valid. PASSED
- CHK-RS-LOCAL-DEFINED - (F) - All locally defined resource codes must roll up to a CDE defined resource code. PASSED
- CHECKGOAL - (F) - All GOAL codes must be valid. PASSED
- CHECKFUNCTION - (F) - All FUNCTION codes must be valid. PASSED
- CHECKOBJECT - (F) - All OBJECT codes must be valid. PASSED
- CHK-FUNDxOBJECT - (F) - All FUND and OBJECT account code combinations must be valid. PASSED
- CHK-FDxRS7690x8590 - (F) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. PASSED
- CHK-FUNDxRESOURCE - (W) - All FUND and RESOURCE account code combinations should be valid. PASSED
- CHK-FUNDxGOAL - (W) - All FUND and GOAL account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-A - (W) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-B - (F) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. PASSED
- CHK-RESOURCExOBJECTA - (W) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RESOURCExOBJECTB - (O) - All RESOURCE and OBJECT (objects 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RES6500xOBJ8091 - (F) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). PASSED

CHK-FUNCTIONxOBJECT - (F) - All FUNCTION and OBJECT account code combinations must be valid. PASSED

CHK-GOALxFUNCTION-A - (F) - Goal and function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. PASSED

CHK-GOALxFUNCTION-B - (F) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). PASSED

SPECIAL-ED-GOAL - (F) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3312, 3318, and 3332. PASSED

GENERAL LEDGER CHECKS

INTERFD-DIR-COST - (W) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. PASSED

INTERFD-INDIRECT - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. PASSED

INTERFD-INDIRECT-FN - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. PASSED

INTERFD-IN-OUT - (W) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). PASSED

LCFF-TRANSFER - (W) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. PASSED

INTRA-FD-DIR-COST - (W) - Transfers of Direct Costs (Object 5710) must net to zero by fund. PASSED

INTRA-FD-INDIRECT - (W) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. PASSED

INTRA-FD-INDIRECT-FN - (W) - Transfers of Indirect Costs (Object 7310) must net to zero by function. PASSED

CONTRIB-UNREST-REV - (W) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. PASSED

CONTRIB-RESTR-REV - (W) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. PASSED

EPA-CONTRIB - (W) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). PASSED

LOTTERY-CONTRIB - (W) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). PASSED

PASS-THRU-REV=EXP - (W) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by resource. PASSED

SE-PASS-THRU-REVENUE - (W) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. PASSED

EXCESS-ASSIGN-REU - (W) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). PASSED

UNASSIGNED-NEGATIVE - (F) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. PASSED

UNR-NET-POSITION-NEG - (F) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. PASSED

RS-NET-POSITION-ZERO - (F) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. PASSED

EFB-POSITIVE - (W) - Ending balance (Object 979Z) is negative for the following resources. Please explain the cause of the negative balances and your plan to resolve them. EXCEPTION

| FUND | RESOURCE | NEG. EFB |
|---|----------|---------------|
| 62 | 0000 | -5,660,536.36 |
| Explanation:OPEB Liability is part of the beginning balance | | |
| Total of negative resource balances for Fund 62 | | -5,660,536.36 |

OBJ-POSITIVE - (W) - The following objects have a negative balance by resource, by fund: EXCEPTION

| FUND | RESOURCE | OBJECT | VALUE |
|---|----------|--------|---------------|
| 62 | 0000 | 9790 | -5,660,536.36 |
| Explanation:OPEB Liability is part of the beginning balance | | | |

REV-POSITIVE - (W) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund. PASSED

EXP-POSITIVE - (W) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund. PASSED

CEFB-POSITIVE - (W) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund.
PASSED

SUPPLEMENTAL CHECKS

EXPORT CHECKS

CHK-DEPENDENCY - (F) - If data have changed that affect other forms, the affected forms must be opened and saved.
PASSED

Checks Completed.

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First Interim
 2020-21 Actuals to Date
 Technical Review Checks

Palisades Charter High
 Los Angeles Unified

Los Angeles County

Following is a chart of the various types of technical review checks and related requirements:

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IMPORT CHECKS

- CHECKFUND - (F) - All FUND codes must be valid. PASSED
- CHK-FUND09-ACTIVITY - (F) - There is no activity in Fund 09. PASSED
- CHECKRESOURCE - (W) - All RESOURCE codes must be valid. PASSED
- CHK-RS-LOCAL-DEFINED - (F) - All locally defined resource codes must roll up to a CDE defined resource code. PASSED
- CHECKGOAL - (F) - All GOAL codes must be valid. PASSED
- CHECKFUNCTION - (F) - All FUNCTION codes must be valid. PASSED
- CHECKOBJECT - (F) - All OBJECT codes must be valid. PASSED
- CHK-FUNDxOBJECT - (F) - All FUND and OBJECT account code combinations must be valid. PASSED
- CHK-FDxRS7690x8590 - (F) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. PASSED
- CHK-FUNDxRESOURCE - (W) - All FUND and RESOURCE account code combinations should be valid. PASSED
- CHK-FUNDxGOAL - (W) - All FUND and GOAL account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-A - (W) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-B - (F) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. PASSED
- CHK-RESOURCExOBJECTA - (W) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RESOURCExOBJECTB - (O) - All RESOURCE and OBJECT (objects 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RES6500xOBJ8091 - (F) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). PASSED

CHK-FUNCTIONxOBJECT - (F) - All FUNCTION and OBJECT account code combinations must be valid. PASSED

CHK-GOALxFUNCTION-A - (F) - Goal and function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. PASSED

CHK-GOALxFUNCTION-B - (F) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). PASSED

SPECIAL-ED-GOAL - (F) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3312, 3318, and 3332. PASSED

GENERAL LEDGER CHECKS

INTERFD-DIR-COST - (W) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. PASSED

INTERFD-INDIRECT - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. PASSED

INTERFD-INDIRECT-FN - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. PASSED

INTERFD-IN-OUT - (W) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). PASSED

LCFF-TRANSFER - (W) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. PASSED

INTRA-FD-DIR-COST - (W) - Transfers of Direct Costs (Object 5710) must net to zero by fund. PASSED

INTRA-FD-INDIRECT - (W) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. PASSED

INTRA-FD-INDIRECT-FN - (W) - Transfers of Indirect Costs (Object 7310) must net to zero by function. PASSED

CONTRIB-UNREST-REV - (W) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. PASSED

CONTRIB-RESTR-REV - (W) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. PASSED

EPA-CONTRIB - (W) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). PASSED

LOTTERY-CONTRIB - (W) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). PASSED

SUPPLEMENTAL CHECKS

EXPORT CHECKS

CHK-DEPENDENCY - (F) - If data have changed that affect other forms, the affected forms must be opened and saved. PASSED

Checks Completed.

SACS2020ALL Financial Reporting Software - 2020.2.0
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19-64733-1995836

First Interim
 2020-21 Projected Totals
 Technical Review Checks

Palisades Charter High
 Los Angeles Unified

Los Angeles County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

- CHECKFUND - (F) - All FUND codes must be valid. PASSED
- CHK-FUND09-ACTIVITY - (F) - There is no activity in Fund 09. PASSED
- CHECKRESOURCE - (W) - All RESOURCE codes must be valid. PASSED
- CHK-RS-LOCAL-DEFINED - (F) - All locally defined resource codes must roll up to a CDE defined resource code. PASSED
- CHECKGOAL - (F) - All GOAL codes must be valid. PASSED
- CHECKFUNCTION - (F) - All FUNCTION codes must be valid. PASSED
- CHECKOBJECT - (F) - All OBJECT codes must be valid. PASSED
- CHK-FUNDxOBJECT - (F) - All FUND and OBJECT account code combinations must be valid. PASSED
- CHK-FDxRS7690x8590 - (F) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. PASSED
- CHK-FUNDxRESOURCE - (W) - All FUND and RESOURCE account code combinations should be valid. PASSED
- CHK-FUNDxGOAL - (W) - All FUND and GOAL account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-A - (W) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. PASSED
- CHK-FUNDxFUNCTION-B - (F) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. PASSED
- CHK-RESOURCExOBJECTA - (W) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RESOURCExOBJECTB - (O) - All RESOURCE and OBJECT (objects 9791, 9793, and 9795) account code combinations should be valid. PASSED

CHK-RES6500xOBJ8091 - (F) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). PASSED

CHK-FUNCTIONxOBJECT - (F) - All FUNCTION and OBJECT account code combinations must be valid. PASSED

CHK-GOALxFUNCTION-A - (F) - Goal and function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: Functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. PASSED

CHK-GOALxFUNCTION-B - (F) - General administration costs (functions 7200-7999, except 7210) must be direct-charged to an Undistributed, Nonagency, or County Services to Districts goal (Goal 0000, 7100-7199, or 8600-8699). PASSED

SPECIAL-ED-GOAL - (F) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3312, 3318, and 3332. PASSED

GENERAL LEDGER CHECKS

INTERFD-DIR-COST - (W) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. PASSED

INTERFD-INDIRECT - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. PASSED

INTERFD-INDIRECT-FN - (W) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. PASSED

INTERFD-IN-OUT - (W) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). PASSED

LCFF-TRANSFER - (W) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. PASSED

INTRA-FD-DIR-COST - (F) - Transfers of Direct Costs (Object 5710) must net to zero by fund. PASSED

INTRA-FD-INDIRECT - (F) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. PASSED

INTRA-FD-INDIRECT-FN - (F) - Transfers of Indirect Costs (Object 7310) must net to zero by function. PASSED

CONTRIB-UNREST-REV - (F) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. PASSED

CONTRIB-RESTR-REV - (F) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. PASSED

EPA-CONTRIB - (F) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). PASSED

LOTTERY-CONTRIB - (F) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). PASSED

PASS-THRU-REV=EXP - (W) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by resource. PASSED

SE-PASS-THRU-REVENUE - (W) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. PASSED

EXCESS-ASSIGN-REU - (F) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). PASSED

UNASSIGNED-NEGATIVE - (F) - Unassigned/Unappropriated balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. PASSED

UNR-NET-POSITION-NEG - (F) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. PASSED

RS-NET-POSITION-ZERO - (F) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. PASSED

EFB-POSITIVE - (W) - Ending balance (Object 979Z) is negative for the following resources. Please explain the cause of the negative balances and your plan to resolve them. EXCEPTION

| FUND | RESOURCE | NEG. EFB |
|---|----------|---------------|
| 62 | 0000 | -5,301,274.76 |
| Explanation:OPEB Liability is part of the beginning balance | | |
| Total of negative resource balances for Fund 62 | | -5,301,274.76 |

OBJ-POSITIVE - (W) - The following objects have a negative balance by resource, by fund: EXCEPTION

| FUND | RESOURCE | OBJECT | VALUE |
|---|----------|--------|---------------|
| 62 | 0000 | 9790 | -5,301,274.76 |
| Explanation:OPEB Liability is part of the beginning balance | | | |

REV-POSITIVE - (W) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund. PASSED

EXP-POSITIVE - (W) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund. PASSED

CEFB-POSITIVE - (F) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund.
PASSED

SUPPLEMENTAL CHECKS

EXPORT CHECKS

CHK-UNBALANCED-A - (W) - Unbalanced and/or incomplete data in any of the forms should be corrected before an official export is completed.
PASSED

CHK-UNBALANCED-B - (F) - Unbalanced and/or incomplete data in any of the forms must be corrected before an official export can be completed.
PASSED

CHK-DEPENDENCY - (F) - If data have changed that affect other forms, the affected forms must be opened and saved.
PASSED

Checks Completed.

Coversheet

Approval of the LCFF Budget Overview for Parents for 2020-21 as required by CDE

Section: V. Finance
Item: B. Approval of the LCFF Budget Overview for Parents for 2020-21 as required by CDE
Purpose: Vote
Submitted by:
Related Material: V.B - PCHS - budgetoverviewparent2020.pdf

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Palisades Charter High School

CDS Code: 1995836

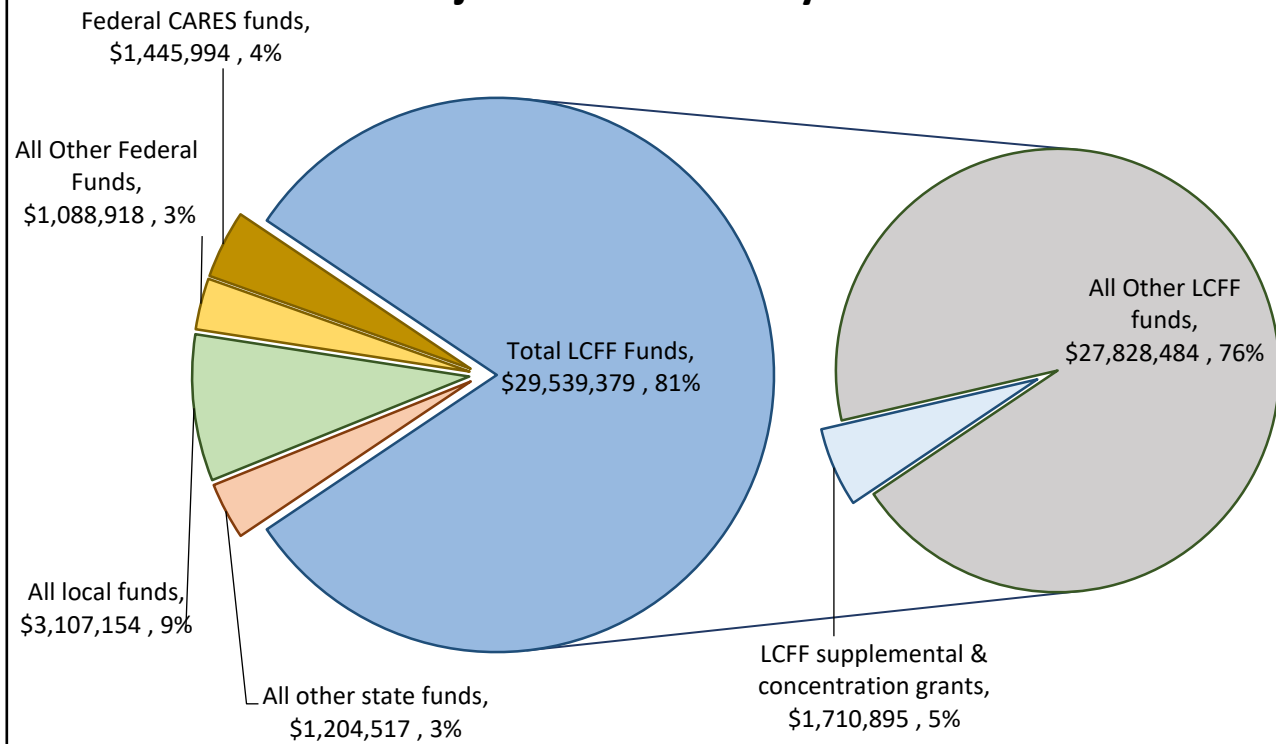
School Year: 2020-2021

LEA contact information: Juan Pablo Herrera

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2020-2021 School Year

Projected Revenue by Fund Source

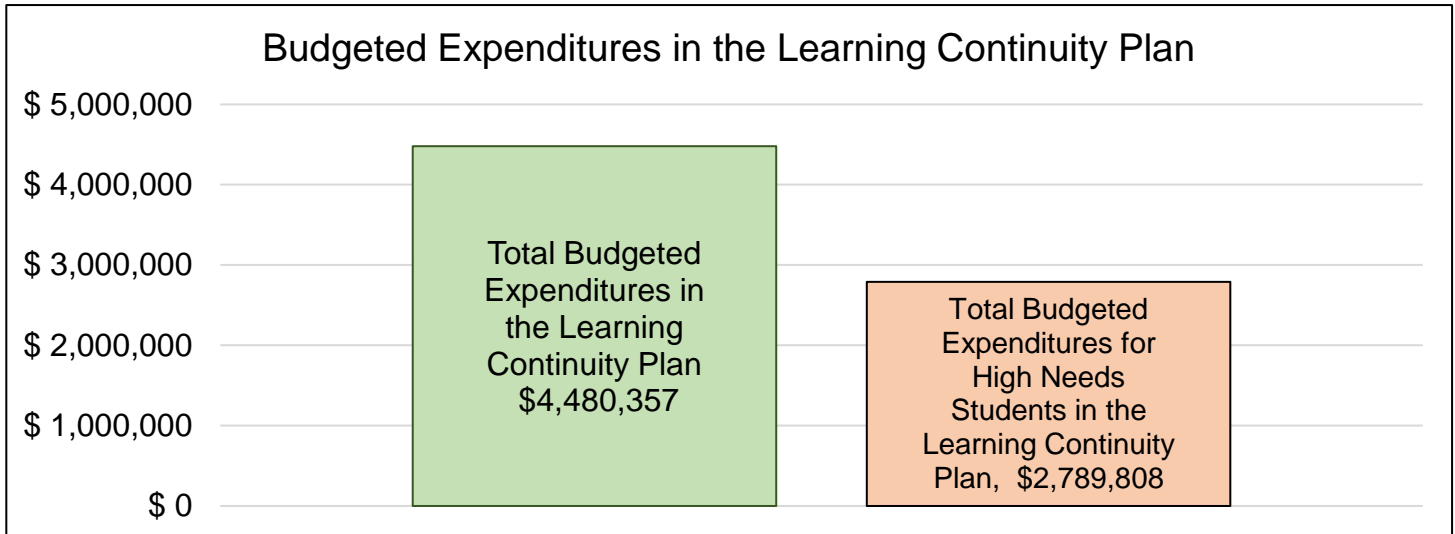


This chart shows the total general purpose revenue Palisades Charter High School expects to receive in the coming year from all sources.

The total revenue projected for Palisades Charter High School is \$36,385,962.00, of which \$29,539,379.00 is Local Control Funding Formula (LCFF) funds, \$1,204,517.00 is other state funds, \$3,107,154.00 is local funds, and \$2,534,912.00 is federal funds. Of the \$2,534,912.00 in federal funds, \$1,445,994.00 are federal CARES Act funds. Of the \$29,539,379.00 in LCFF Funds, \$1,710,895.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

For the 2020-21 school year school districts must work with parents, educators, students, and the community to develop a Learning Continuity and Attendance Plan (Learning Continuity Plan). The Learning Continuity Plan replaces the Local Control and Accountability Plan (LCAP) for the 2020–21 school year and provides school districts with the opportunity to describe how they are planning to provide a high-quality education, social-emotional supports, and nutrition to their students during the COVID-19 pandemic.



This chart provides a quick summary of how much Palisades Charter High School plans to spend for planned actions and services in the Learning Continuity Plan for 2020-2021 and how much of the total is tied to increasing or improving services for high needs students.

Palisades Charter High School plans to spend \$35,946,201.00 for the 2020-2021 school year. Of that amount, \$4,480,357.44 is tied to actions/services in the Learning Continuity Plan and \$31,465,843.56 is not included in the Learning Continuity Plan. The budgeted expenditures that are not included in the Learning Continuity Plan will be used for the following:

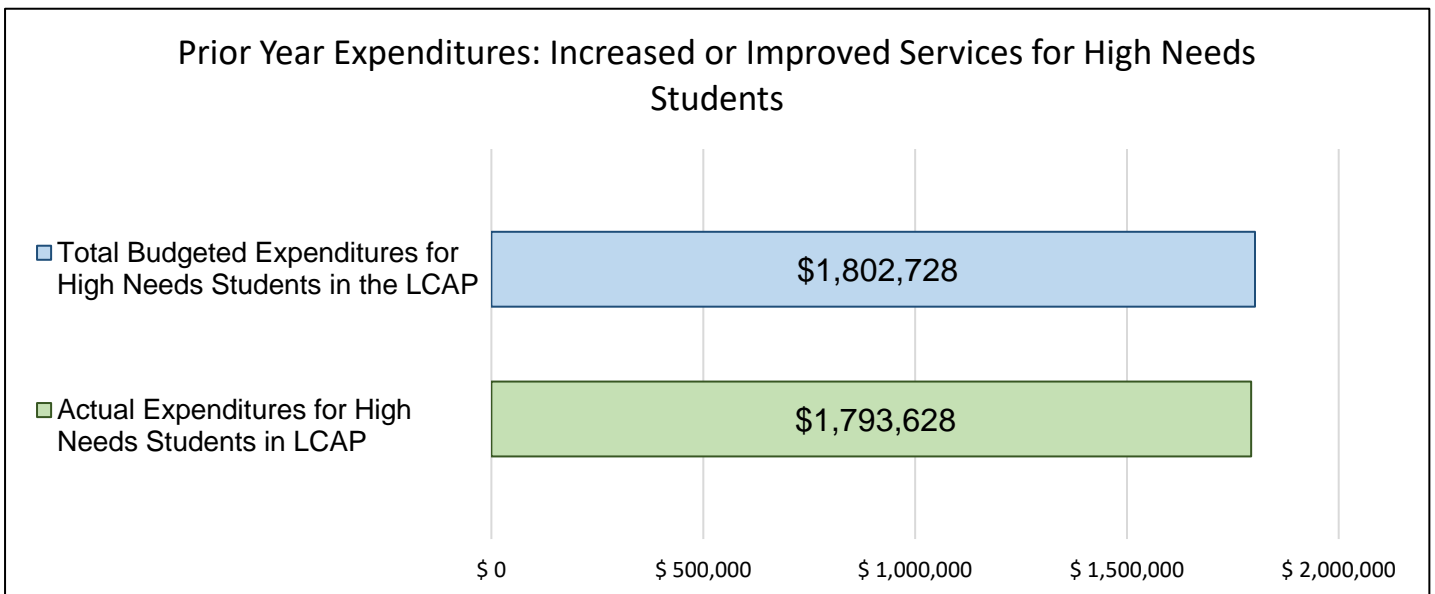
General fund expenses not included in the learning continuity plan include expenses such as certificated and classified salaries, which are expenses PCHS has incurred independent of the pandemic. Other expenses include instructional materials, existing technology, special ed NPA/NPS, and operations.

LCFF Budget Overview for Parents

Increased or Improved Services for High Needs Students in in the Learning Continuity Plan for the 2020-2021 School Year

In 2020-2021, Palisades Charter High School is projecting it will receive \$1,710,895.00 based on the enrollment of foster youth, English learner, and low-income students. Palisades Charter High School must describe how it intends to increase or improve services for high needs students in the Learning Continuity Plan. Palisades Charter High School plans to spend \$2,789,808.00 towards meeting this requirement, as described in the Learning Continuity Plan.

Update on Increased or Improved Services for High Needs Students in 2019-2020



This chart compares what Palisades Charter High School budgeted in the 2019-20 LCAP for actions and services that contributed to increasing or improving services for high needs students with what Palisades Charter High School actually spent on actions and services that contributed to increasing or improving services for high needs students in the 2019-20 school year.

In 2019-2020, Palisades Charter High School's LCAP budgeted \$1,802,728.00 for planned actions to increase or improve services for high needs students. Palisades Charter High School actually spent \$1,793,628.00 for actions to increase or improve services for high needs students in 2019-2020. The difference between the budgeted and actual expenditures of \$9,100.00 had the following impact on Palisades Charter High School's ability to increase or improve services for high needs students:

The total actual expenditures for actions and services to increase and improve services for high needs students was tied to the amount received in supplemental/concentration funding. The actual amount received by PCHS in supplemental & concentration was \$9,100 lower than expected. This did not have any impact over the planned services & actions for high needs students in the 2019-2020 FY.

Coversheet

Approval of Request for Opinion from FPPC Regarding Conflict of Interest Questions

Section: VII. Governance
Item: A. Approval of Request for Opinion from FPPC Regarding Conflict of Interest Questions
Purpose: Vote
Submitted by:
Related Material: Palisades BOT FPPC Questions FINAL DRAFT 12_05_2020.pdf

Consideration of Approval of Request for Formal Opinion Relating to the Participation of Employees, Students, and Parents in the Governance Decisions Made by the Charter School Board

BACKGROUND:

At the Palisades Charter High School (“PCHS”) Board retreat held on September 12 of this year, there was an extensive Board discussion regarding questions that the Board and staff have about how to interpret conflict of interest laws made applicable to California charter schools as a result of the enactment of Education Code Section 47604.1 (“SB 126”). As an example, there is confusion about how to interpret Section 47604.1(d) that allows employees to serve on the Charter School’s Board if the employee abstains from voting on or attempting to influence the vote on “all matters uniquely affecting” their employment. In order to resolve these questions definitively given the lack of statutory and regulatory guidance about how the California conflict of interest laws apply in a charter school setting, legal counsel recommended that we seek an official opinion from the Fair Political Practices Commission. This course of action was recommended because it would afford employees a greater degree of certainty about when they may participate in Board and Committee meetings, and help to mitigate the risk of fines and/or administrative or civil actions due to lack of clarity about when Board members should abstain from participating in the discussion and vote.

It was agreed at the retreat that all members would forward questions to the Board Chair to share with legal counsel, and that counsel would also develop some questions in an attempt to resolve as many questions as possible about when parents, students and employees could participate in discussions and votes. Following the retreat, the Board Vice Chair posed several questions that were answered by staff based on the charter document’s current provisions.

The PCHS charter provisions and/or adopted Board policies may contain conflict of interest requirements that are more stringent than what the State law requires; however, such requirements may not be less restrictive than Government Code 1090, the Political Reform Act, the Corporations Code, or implementing regulations. Thus, to the extent that the PCHS charter provides that employees, parents, or students cannot vote or participate in discussions on a particular item, this conflict of interest rule will apply until such time as the charter or Board policy is amended even if the FPPC says in their response opinion that state law does not prohibit participation. The purpose of seeking an FPPC opinion on these questions is to determine:

1. Whether proposals to change the PCHS charter or Board policies can be considered based on the changes to the law created by Education Code Section 47604.1 and the Fair Political Practices Commission’s interpretation of the Political Reform Act and Government Code Section 1090; or
2. Whether the Charter School may have some additional flexibility under State law to allow stakeholders to participate in discussions and votes at the Board and committee levels than the current charter provisions and school policies contemplate.

Further, it is our hope that seeking an opinion from the State will help to resolve longstanding conflicts among Board members and stakeholders relating to the interpretation of how these laws apply in a

charter school context and that this will, in turn, result in smoother Board meetings more focused on the substance of what is proposed than the process of how decisions are being made.

At the November 2020 meeting of the Board, the Board agreed to have Board members forward additional questions directly to counsel. Legal counsel has reviewed the questions submitted by the Board Vice Chair, Board Member John Rauschuber, and Board Member Izzy Gill. The questions submitted by the Board Vice Chair and Board Member Rauschuber have been incorporated into the attached request for an opinion, but have been reframed in some cases to fit the format and structure of the request and in some cases to provide additional details that are likely critical to FPPC's analysis.

The questions submitted by Ms. Gill do not relate to conflicts of interest associated with students serving on the Board, but rather to student participation in governance generally. These issues are not part of the FPPC's jurisdiction so may be addressed in a separate opinion to be shared with the full Board. The FPPC only answers questions relating to implementation of conflict of interest laws found in the Political Reform Act and Government Code Section 1090.

RECOMMENDATION:

That the Board approve sending the attached request for a formal legal opinion to the FPPC.



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December 9, 2020

Richard C. Maidich, Chairperson
Fair Political Practices Commission
1102 Q Street, Suite 3000
Sacramento, CA 95811

RE: Request for Opinion on How SB 126 (Education Code Section 47604.1) Applies to Ongoing Governance of Palisades Charter High School

Dear Chairperson Maidich:

I am writing on behalf of Palisades Charter High School ("Charter School"), a California public charter school authorized by the Los Angeles Unified School District, to request a formal opinion of the Fair Political Practices Commission regarding the implementation of the provisions of SB 126, which were codified in Education Code section 47604.1(b) and (d). As you know, prior to SB 126 being signed into law, there was some ambiguity about whether the Political Reform Act and Government Code 1090 applied to charter schools and the nonprofits that operate them. SB 126 resolved this in the affirmative. But SB 126 also contained an important carve out now contained in EC section 47604.1(d) which expressly allows charter school employees to serve on the Board of the same charter school that employs them provided that they do not vote on, or influence or attempt to influence another member of the governing body regarding "all matters uniquely affecting that member's employment".

The Charter School has employees of the Charter School serving on its Board of Directors, which is charged with a number of functions under its charter. You will find information about the roles and responsibilities of the Board and its committees contained in the attached charter document. The charter functions as the governing document of the school, much as a city charter serves as the governing document of a city.

The Charter School also has standing committees of the Board who are charged with making recommendations about items in their respective jurisdictions. Employees serve on some of these committees and have requested the ability to serve on others. Parents and students also serve on some of these committees.

The Charter School wishes to be compliant with the law in all of its operations, and does not want parent, student, or employee members of the Board or Board committees to be personally at risk of fines or criminal prosecution. Given the lack of guidance regarding implementation of SB 126, the Charter School hereby requests a formal opinion from the FPPC regarding the following questions:

Parent Members of a Charter School Board



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- 1) May a member of the Charter School board who has a child attending the Charter School as a student influence their Board colleagues, attempt to influence their Board colleagues, or vote on the following items on the Charter School Board's agenda:
 - a. Curriculum of the school that their child as a student will receive.
 - b. Graduation requirements for students enrolled at the Charter School.
 - c. The academic calendar and length of the school day that their child will abide by.
 - d. Contracts for school lunch providers where their child participates in the free and reduced lunch program and it would impact how much they need to pay for lunch for their child.
 - e. Employee discipline or terminations relating to their child's teacher.
 - f. The rates charged to parents for school transportation services if their child receives services from the school busing program.
 - g. Settlement agreements relating to legal claims of their children or other parents.
 - h. Suspension or expulsion of their child.
 - i. The budget of the Charter School.
 - j. An E-learning policy that provides for distance learning for students during the pandemic and which might arguably have a negative academic impact on their child.

Student Members of the Board or Board Committees

- 2) May a member of the Charter School board who is a student enrolled at the Charter School influence their Board colleagues, attempt to influence their Board colleagues, or vote on the following items on the Charter School Board's agenda:
 - a. Curriculum of the school that the student will receive.
 - b. The academic calendar and length of the school day that the student will be required to abide by.
 - c. Contracts for school lunch providers where the student participates in the free and reduced lunch program and it would impact how much they or their family pay for lunch.
 - d. Employee discipline or terminations relating to the student's teacher(s).
 - e. The rates charged to parents for school transportation services if the student themselves received services from the school busing program.
 - f. Settlement agreements relating to legal claims of the student, the student's teachers, or fellow students.
 - g. The budget of the Charter School.
 - h. Suspension or expulsion of their fellow students.
 - i. An E-learning policy that provides for distance learning for students during the pandemic and which might have a negative academic impact on the student's own education
- 3) May student members of a Board committee influence, attempt to influence or vote on the above items?
- 4) Are there any conflict of interest laws that apply differently to student members due to the students being under the age of 18?



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Employee Members of the Board

5) May a member of the Charter School board who is an employee of the Charter School influence their Board colleagues, attempt to influence their Board colleagues, or vote on the following items on the Charter School Board's agenda:

- a. Curriculum of the school that the employee will be responsible for delivering, particularly if the vote might impact the number of hours the employee will need to spend to prepare and deliver such curriculum.
- b. The academic calendar and length of the school day that the employee will be obligated to work.
- c. Contracts for health/vision/dental plans that the employee and their fellow employees would be eligible to participate in as employees.
- d. Contracts for investment advisors and companies that would be retained by the school to invest funds to cover retiree health benefit costs of employees.
- e. Employee discipline or terminations relating to themselves or other employee(s).
- f. Setting the deductible and contribution rates of employees regarding health/dental/vision benefits.
- g. Settlement agreements relating to legal claims of the employee or other employees.
- h. The budget of the Charter School, where the budget includes allocations toward salaries, benefit costs and retiree health care costs of all employees. Additionally, If the vote on the budget was only to approve non-compensation items, would this yield a different result?
- i. Allocations of funds to reimburse employees for expenses that they incur.
- j. The negotiation or approval of collective bargaining agreements or proposals made by the Charter School at the collective bargaining table. Would the answer to this question change if the employee was also a member of the union's negotiating team or serves as an officer or Board member of the union responsible for negotiating the contract with the Charter School?
- k. An E-learning policy that provides for distance learning for students and impacts an employee's work environment and need to commute to work but does not impact salaries or benefits paid to employees.
- l. A loan, including a federal PPP loan, which may be forgiven and become a grant to the school. In order to be forgiven, a significant percentage of these funds would need to be allocated toward the retention of employees, including salaries, of the school.
- m. The contract of the Executive Director/Principal or other supervisor of the employee.

6) May a teacher serve on the Budget and Finance Committee of the Charter School Board that makes recommendations to the Charter School Board on budget and finances of the Charter School as long as they do not influence, attempt to influence or vote on any financial decision that does not impact them

financially? For example, could they lawfully participate in discussions and vote to give scholarships to students for busing costs, purchase technology for students, or allocate funds to facilities improvements? Given that the decision to allocate funds or not allocate funds toward these types of non-compensation



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items will impact the amount remaining available to allocate to compensation items, are votes on these types of allocations permissible by employee members of a Charter School Budget and Finance Committee?

Who Has Responsibility for Ensuring Compliance?

7) When a debate arises on the Charter School Board about whether an item is a conflict of interest for one or more members to vote on, who makes the decision about whether the member participates in the discussion and vote? For example, frequently there are situations where a Board member believes that it is not a conflict of interest for them to participate in a discussion and vote on an item, but some other members of the Board or staff disagree. In such a case, does the individual member make the decision about whether to participate and accept the risk of penalties, or can the Charter School Board compel a member to not participate in the discussion and vote on a particular item where they believe that the member has a conflict of interest?

Our sincere attempts to comply with the laws surrounding these topics in a charter school setting has proven to be quite difficult because there is so much uncertainty about how conflict of interest laws apply to different stakeholder groups at the Charter School. Your assistance in answering these questions will not just be of benefit to our school, but also to more than 1,000 other charter schools operating statewide that want to comply with the provisions of SB126 and Education Code Section 47604.1, but are unsure how to do so. Your opinion will provide some certainty to ensure that employees and other stakeholders serving on charter school boards understand clearly when they are putting themselves at risk by participating in a discussion or vote.

If you should have any questions, please do not hesitate to call me.

Sincerely,

Pam Magee
Executive Director

Coversheet

Review and Discussion of Current Committee Structure

Section: VII. Governance
Item: B. Review and Discussion of Current Committee Structure
Purpose: Vote
Submitted by:
Related Material: Draft GP #9_12_07_2020.pdf



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GP#9 : Board Committee Membership and Responsibilities

- 9.1 All Board committees serve at the pleasure of the Board, under Board direction, and in accordance with the terms of the approved charter. The Board maintains Board Level Committees (“BLC”) and Stakeholder Board Level Committees (“SBLC”) as defined in the charter. The Board maintains final authority on all items except where the Board or the terms of the Charter has delegated final decision-making authority to the committee (i.e. Grade Appeal Committee or Collective Bargaining Committee).
- 9.2 Committee composition shall be as established in the charter. Any membership not directed by the charter, shall be established by the Board or delegated by the Board to the Committee Chairperson. The Board may remove any committee member with or without cause at its discretion, but the removal of a committee member shall not be used to undermine the faculty’s right to constitute a majority on each SBLC. Unless otherwise directed in the charter, committees shall be no larger than 9 members.
- 9.3 Every committee shall have a chairperson and secretary. The chairperson of each SBLC committee shall be selected by the Board. The chairperson of each BLC shall be selected by the committee. The secretary of each SBLC and BLC committee shall be selected by each committee upon formation. Each committee may elect other officers as desired by the committee. In the absence of Board action assigning an SBLC committee chairperson, the Board Chairperson shall appoint a SBLC committee chairperson.
- 9.4 All committee members shall have the authority to vote subject only to the Recusal Policy adopted by the Board which shall apply equally to committee members. Only committee members may have the authority to vote.
- 9.5 All standing Board Level Committee and Stakeholder Board Level Committee meetings shall comply with the Brown Act. Ad Hoc committees composed of solely of a minority of the Board shall have no obligation to the comply with the Brown Act.
- 9.6 The committee chairperson is responsible for ensuring compliance with the Brown Act, meeting with the EDP to establish the agenda for the committee meetings, and effectively chairing each committee meeting.
- 9.7 The committee secretary is responsible for ensuring the minutes of each meeting are documented, compiled, and published.
- 9.8 The purpose, role, and duties of each committee is established by the Board annually in alignment with the terms of the approved charter. Any purpose, role, or duties outside of those established by the Board shall be developed by the committee and proposed to the Board for approval. The committee chairperson shall recommend to the committee an annual calendar of committees to accomplish the purpose, role, and duties as adopted by the Board. Once the annual calendar is adopted, it shall be submitted to the EDP and Board Chairperson for comment, as each deems necessary.
- 9.9 Any subcommittee shall be recommended by BLC or SBLC and approved by the Board.



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- 9.11 Any failure of a committee to complete an assigned responsibility shall not delay recommendations or action by the EDP or Board. The day to day operation of the School and the authority of the Board is not subject to the actions or inactions of any committee.
- 9.12 All committees may be disbanded by the Board with the exception of the Budget and Finance Committee. The Board desires to maintain a committee structure of a sufficient number to enable the board to carry out its governance roles and responsibilities in an efficient and effective manner. However, the Board believes that too many committees can create a cumbersome structure and, in some cases, can invite micromanagement which fails to align with the PCHS governance philosophy as described herein and in the approved charter.