



Palisades Charter High School

Board Meeting

Date and Time

Tuesday August 23, 2022 at 5:00 PM PDT

Location

Gilbert Hall, Palisades Charter High School
15777 Bowdoin Street, Pacific Palisades, CA 90272

*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	Maggie Nance	
B.	Record Attendance and Guests		2 m
C.	Public Comment		30 m
<p><i>"Public Comment" is available to all audience members who wish to speak on any agenda item or under the general category of "Public Comment." "Public Comment" is set aside for members of the audience to raise issues that are not specifically on the agenda. However, due to public meeting laws, the Board can only listen to your issue, not respond or take action. These presentations are limited to two (2) minutes, per person. 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).</i></p> <p>Google Form Public Comment Procedure: A Google form is available 24 hours prior to the meeting for Public Comment. Please refer to the Dewey Dolphin email or copy/paste this link https://forms.gle/kSsxkvL6T9GgXpdEA. Your comment will be read aloud by the Board Vice Chair. Public comments submitted through the Google form will be read after the public comments presented live at the meeting. General public comments not read after 60 minutes will be included in the meeting minutes. Due to public meeting laws, the Board can only listen to your 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).</p>			
D.	Approve Minutes	Approve Minutes Maggie Nance	2 m
Approve minutes for Governance/Brown Act Training on July 16, 2022			
E.	Approve Minutes	Approve Minutes Maggie Nance	5 m
Approve minutes for Special Board Meeting on July 25, 2022			

	Purpose	Presenter	Time
II. Organizational Reports			5:39 PM
A. Student Report	FYI	Peter Garff	5 m
B. Parent Report	FYI	Monica Batts-King, Melissa Schilling, Saken Sherkhanov	5 m
C. Classified Staff Report	FYI	Andrew Paris	5 m
D. Faculty Report	FYI	Lisa Saxon, Maggie Nance	5 m
E. Human Resources Director (HR) Report	FYI	Martha Monahan	5 m
F. Director of Operations Report	FYI	Don Parcell	5 m
G. Admin. Safety and Security Team	FYI	Maggie Nance	5 m
		• Fencing Update	
H. Director of Development Report	FYI	Mike Rawson	5 m
I. Chief Business Officer (CBO) Report	FYI	Juan Pablo Herrera	5 m
J. Executive Director/Principal (EDP) Report	FYI	Dr. Pam Magee	5 m
III. Board Committees (Stakeholder Board Level Committees)			6:29 PM
A. Academic Accountability Committee Update	FYI	Minh Ha Ngo	5 m
B. Budget & Finance Committee Update	FYI	Sara Margiotta	5 m
C. Election Committee Update	Vote	Sara Margiotta	5 m
		• Approve 1-Year (PCHS Employee Stakeholder only) Board of Trustee nominee	
		• Approve 2-Year (All Stakeholder) Board of Trustee nominee	
IV. Board Committees (Board Members Only)			6:44 PM
A. Board Members Only- Committee Updates	FYI	Various	5 m
		• Audit Committee	

	Purpose	Presenter	Time
<ul style="list-style-type: none"> • Grade Appeal Committee • Survey Committee 			
V. Academic Excellence			6:49 PM
A. Changes/Updates in Response to COVID	FYI	Tammie Wilson, Dr. Pam Magee	5 m
B. PCHS Attendance Policy	Vote	PCHS Administrators	5 m
"To approve the revised PCHS Attendance Policy as presented on August 23, 2022."			
C. Independent Study and Independent Study Agreement	Vote	Dr. Chris Lee	5 m
VI. Athletic Update			7:04 PM
A. Contract for Football Game Physician	Vote	Brian Banducci	5 m
VII. Finance			7:09 PM
A. 2021-2022 Unaudited Actuals	Vote	Juan Pablo Herrera	5 m
B. 2022-2023 Budget Update	FYI	Juan Pablo Herrera	5 m
C. 2022-2023 Datalink Networks Contract	Vote	Juan Pablo Herrera	5 m
D. 2022-2023 CONAPP (CARS) Approval	Vote	Juan Pablo Herrera	5 m
VIII. Palisades Educational Support Personnel United (PESPU) Sunshine Proposal			7:29 PM
A. PESPU Sunshine Proposal	Vote	Martha Monahan	5 m
IX. Governance			7:34 PM
Governance			
A. Consideration of Eighth Amendment to Contract for Employment of Executive Director/Principal	Vote	Maggie Nance	5 m
"Motion to approve the employment contract amendment for the Executive Director/Principal"			
B. Election of Board Officer - Board Chair	Vote	Maggie Nance	5 m

	Purpose	Presenter	Time
C. Election of Board Officer - Board Vice Chair	Vote	Maggie Nance	5 m
D. Election of Board Office - Board Secretary	Vote	Maggie Nance	5 m
E. 2021-2022 Annual Performance Based Oversight Visit Report	FYI	Dr. Pam Magee	5 m
X. New Business / Announcements			7:59 PM
A. Announcements / New Business	FYI	Maggie Nance	1 m
		<ul style="list-style-type: none"> • Date of the Annual Board/Goal Setting Retreat: Saturday, September 10, 2022 at 10am • Date of the next Board Meeting: Tuesday, September 20, 2022 at 5pm 	
B. Announce items for closed session, if any.	FYI	Maggie Nance	1 m
XI. Closed Session			8:01 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. Employee complaint/Assignment/Discipline/Dismissal/Release	Vote	Martha Monahan	5 m
		<ul style="list-style-type: none"> • (Govt. Code section 54957) (Education Code section 44929.21) 	
C. Potential Litigation	Vote		5 m
		<ul style="list-style-type: none"> • Significant exposure to litigation pursuant to paragraph (2) or (3) of subdivision (d) of Government Code section 54956.9 	
XII. Open Session			8:16 PM
A. Return to Open Session	FYI	Maggie Nance	1 m
B. Report Out on Action Taken In Closed Session, If Any.	FYI	Maggie Nance	1 m

	Purpose	Presenter	Time
XIII. Closing Items			8:18 PM
A. Adjourn Meeting	FYI	Maggie Nance	1 m

Coversheet

Approve Minutes

Section: I. Opening Items
Item: D. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Governance/Brown Act Training on July 16, 2022

APPROVED



Palisades Charter High School

Minutes

Governance/Brown Act Training

Date and Time

Saturday July 16, 2022 at 10:00 AM

Location

Join Zoom Meeting

<https://palihigh-org.zoom.us/j/84403797245?pwd=NkdVaXIDWTBJejlCcXI4WTJlamh4Zz09>

Meeting ID: 844 0379 7245

Passcode: dolphins

One tap mobile

+16699009128,,84403797245#,,,,*72651435# US (San Jose)

+16694449171,,84403797245#,,,,*72651435# US

Dial by your location

+1 669 900 9128 US (San Jose)

+1 669 444 9171 US

+1 346 248 7799 US (Houston)

+1 253 215 8782 US (Tacoma)

+1 646 931 3860 US

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

Meeting ID: 844 0379 7245

Passcode: 72651435

Find your local number: <https://palihigh-org.zoom.us/j/84403797245?pwd=NkdVaXIDWTBJejlCcXI4WTJlamh4Zz09>

Trustees Present

Andrew Paris, David Pickard IV, Karen Ellis, Lisa Saxon, Maggie Nance, Monica Batts-King, Peter Garff, Saken Sherkhonov, Sara Margiotta

Trustees Absent

Amir Ebtehadj, Melissa Schilling

Ex Officio Members Present

Dr. Pam Magee, Juan Pablo Herrera

Non Voting Members Present

Dr. Pam Magee, Juan Pablo Herrera

Guests Present

Amy Omyendu, Greta Proctor, Karen Cox

I. Opening Items

A. Call the Meeting to Order

Karen Cox called a meeting of the board of trustees of Palisades Charter High School to order on Saturday Jul 16, 2022 at 10:17 AM.

B. Record Attendance and Guests

C. Public Comment

No public comment made

II. Approve Minutes

A. Approve Minutes for Special Board Meeting on June 24, 2022

David Pickard IV made a motion to approve the minutes from Special Board Meeting on 06-24-22.

Sara Margiotta seconded the motion.

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

Roll Call

Monica Batts-King Aye

Sara Margiotta Aye

David Pickard IV Aye

Melissa Schilling Absent

Maggie Nance Aye

Roll Call

Lisa Saxon	Abstain
Amir Ebtehadj	Absent
Karen Ellis	Aye
Saken Sherkanov	Abstain

B. Approve Minutes for Board Meeting on June 21, 2022

Lisa Saxon made a motion to approve the minutes from Board Meeting on 06-21-22.
David Pickard IV seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

Melissa Schilling	Absent
Monica Batts-King	Aye
Karen Ellis	Aye
David Pickard IV	Aye
Saken Sherkanov	Abstain
Lisa Saxon	Aye
Maggie Nance	Aye
Sara Margiotta	Aye
Amir Ebtehadj	Absent

III. New Business/Announcements

A. Upcoming Board Meeting Dates

S Margiotta highlighted upcoming meetings. Next monthly meeting Tuesday August 23, 2022 at 5 pm and Annual Goal Setting Meeting Saturday Sept. 10, 2022 at 10 am.

IV. Governance

A. Updates Regarding the Upcoming School Year

A Omyendu discussed orientation. Due to a variety of issues in-person orientation for Sophomores, Juniors and Seniors is transferring to an online format. Virtual Pali Family orientation is on August 8, 2022. Freshman orientation is at 8:30 am on August 9, 2022. The afternoon of August 9, 2022 is for new student orientation (non-freshman). Senior portraits are in person in studio and on campus. On campus mobile cart will be in October. Photos should be completed by Christmas break. Amy will share info re: studio appointments but majority of students do portraits on campus via mobile cart. New Student Period will be discussed during orientation and virtual Pali Family Orientation. Information will also be shared via email communication and posting on school website.

B. Board Governance Training Material/Binder

S Margiotta discussed Board Governance Training Materials highlighting the documents included in materials. P Magee agreed to forward current schoolwide goals which were

not included in packet. All Board members were strongly encouraged to review and become familiar with all of these materials prior to our August 2022 Board meeting.

C. Form 700 for Trustees Taking Office

JP Herrera discussed the Form 700 Statement of Interest. These need to be completed by all Board members including our student representative.

D. Board Governance Training

G Proctor reviewed Board Governance Training was reviewed and stands as submitted.

V. 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 12:17 PM.

Respectfully Submitted,
Sara Margiotta

Coversheet

Approve Minutes

Section: I. Opening Items
Item: E. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Special Board Meeting on July 25, 2022

APPROVED



Palisades Charter High School

Minutes

Special Board Meeting

Date and Time

Monday July 25, 2022 at 10:00 AM

Location

Please click the link below to join the webinar:

<https://go.palihigh.org/SpecialBoTLive>

Or One tap mobile :

US: +16699009128,,89166521367# or +16694449171,,89166521367#

Or Telephone:

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

US: +1 669 900 9128 or +1 669 444 9171 or +1 346 248 7799 or +1 253 215 8782 or +1 564 217 2000 or +1 646 558 8656 or +1 646 931 3860 or +1 301 715 8592 or +1 312 626 6799 or +1 386 347 5053

Webinar ID: 891 6652 1367

International numbers available: <https://palihigh-org.zoom.us/j/keJzch8KYE>

The Palisades Charter High School Board of Trustees Meeting for Monday, July 25, 2022, at 10:00a.m. will move to a virtual/teleconferencing environment.

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY:

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Trustees Present

Andrew Paris, David Pickard IV, Maggie Nance, Melissa Schilling, Monica Batts-King, Sara Margiotta

Trustees Absent

Saken Sherkhanov

Ex Officio Members Present

Dr. Pam Magee, Juan Pablo Herrera

Non Voting Members Present

Dr. Pam Magee, Juan Pablo Herrera

Guests Present

Brian Banducci, Jeff Roepel, Karen Ellis, Patti Jaffe, Peter Garff

I. Opening Items

A. Call the Meeting to Order

Maggie Nance called a meeting of the board of trustees of Palisades Charter High School to order on Monday Jul 25, 2022 at 10:09 AM.

B. Record Attendance and Guests

C. Public Comment

Maria - Please re negotiate mask rules with union to remove mask wearing. The science has changed on masks. Masks are shown to contain bacteria and fungi. The virus size is smaller than medical mask defense, only protects against spitting. Currently countries with strictest mask mandates have highest no of cases. Masks do increase inhalation of CO2 which is damaging to brain. And we are all vaccinated. Please no more masks.

II. Governance

A. Board of Trustees Ad Hoc Election Committee

S Margiotta reported that the Board has received 2 resignations, Jack Seltzer and Amir Ebtehadj. Both were due to new scheduling conflicts. Both Board seats were community seats. She clarified that since the 2021/2022 Election Committee was disbanded after the completion of its work during that respective school year, the Board of Trustees needs to create an Ad Hoc, Board of Trustees only, Committee to hold a Special Election in order to fill those seats in advance of our regular Board of Trustees Meeting. A Paris, M Nance, S Margiotta, M Schilling and D Pickard volunteered to be on this Ad Hoc Committee. It was noted that B King, past Election Committee Chair has agreed to transition and On Board this committee to facilitate the Special Election Process.

Maggie Nance made a motion to approve the Ad Hoc Election Committee of S Margiotta, M Nance, A Paris, D Pickard and M Schilling to fill 2 Community Board of Trustees Seats, ideally by the Board of Trustees August 2022 meeting.

Andrew Paris seconded the motion.

P Garff voiced approval on behalf of student body.

Karen Ellis approved

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

Roll Call

Melissa Schilling	Aye
Sara Margiotta	Aye
Andrew Paris	Aye
Monica Batts-King	Aye
David Pickard IV	Aye
Maggie Nance	Aye

III. New Business / Announcements

A. Announcements / New Business

Date of next Board meeting is August 23, 2022 at 5 pm.

B. Announce items for closed session, if any.

IV. 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 10:21 AM.

Respectfully Submitted,
Sara Margiotta

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 08_23_2022.pdf



PALISADES

CHARTER HIGH SCHOOL

Human Resources Report Board of Trustees Meeting August 23, 2022

New Employees 2022-2023:

Certificated

Achen, John	PE Teacher
Arnold, Winston	Comp Sci Teacher
Barker, Jill	Interventionist Counselor 22.23 SY
Black, Antoinetta	Spe Ed RSP Teacher
Cheng, Allison	Choir Teacher
Garrison, Dana	Social Science Teacher
Golad, Matthew	Maker Space/STEAM teacher
Hundley, Noah	English Teacher
Hutchinson, Bethany	Counselor
Knoll, Justin	Social Science Teacher
McClellan, Moosa	English Teacher
Montz, Richard	Athletic Director
Showers, Chelsay	School Psychologist
Skelly, Shannon	English Teacher
Ye, Peter	Band Teacher

Classified

Name	Department
Herring, Jacoby	Special Ed Assistant
Myers, Shiro	Snr Office Assistant
Navarro, Erick	Campus Aide
Ohmer, Greg	Study Center Coordinator
Urborg, Ethan	Math Paraprofessional

Unrepresented

Banducci, Brian	Assistant Principal
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Monahan, Martha	Dir. Human Resources
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Resignations/Retirements 2021-2022:

Certificated

Name	Department
Acimovic, Erin	Interventionist Counselor
Agiular, Fabian	Math Teacher
Agius, Jamie	Makers Space
Berry, Christopher	Social Science
Cappelli, Mary	English Teacher
Clarke, Brenda	Spe Ed Teacher
Cohen, Ronnie	English Teacher
Ford, Rahmon	Spe Ed RSP
Peeks, Jennifer	Counselor
Saiza, Jeanne	Social Science
Santana, Simon	Math Teacher
Turnblom, Michael	Choir Teacher
Vieira, John	Comp Sci/Game Design
Villagran, Catherine	Art Teacher

Classified

Name	Department
Albert, Bryant	Study Center Coord
Bortner, Amanda	Writing tutor
Brand, Finley	Writing tutor
Burch, Anthony	Office Assistant
Goujon, Emily	Special Ed Assistant
Hidalgo, Kevin	Math Para
James, Shanise	Spe Ed Assistant
Lemus, Marvin	Sub Coordinator

Powell, Rachel	Writing tutor
Reyes, Hector	Campus Aide
Robinson, Sylvester	Math Para
Salama, Dina	Ed Tech Coordinator
Simmons, JoLeta	Senior Office Assistant
Styrbicki, Charles	Math Para
Thomas, Domonick	Tech I
Thomas, Russell	Spe Ed Assistant
Wilcox, Cody	Tech I
Wright, Dean	Stage Tech

Unrepresented

Name	Department
Bush, Mary	Dir. SSS
Green, Marlon	College Advisor
Howard, Russel	Assistant Principal
Nguyen, Amy	Dir. Human Resources
Schoolsky, Ariel	Spe Ed

Negotiations: PCHS and the UTLA-PCHS union signed a tentative agreement for the 2022-23 school year on June 7, 2022. An additional MOU proposal for a Teacher Choice 0/7 Prep Period is being presented to unit members by UTLA-PCHS. PESPU sunshined their proposal for the 2022-2023 school year on Friday, August 19, 2022. Both the PCHS administration and the PESPU union outline of topics to be discussed are attached in the sunshine documents.

Benefits:

Open Enrollment for all eligible PCHS employees closed on August 19th. During the month of October the Navia system will open online enrollment for PCHS employees to sign up for flexible spending accounts. This money will be deducted for their accounts pre-tax. HR has a representative from Schools First, SISC and CALSTRS hosting an in person information session regarding 403(b) retirement information for faculty and staff in October. A representative from Schools First was available for employees in the staff cafeteria on August 15, 2022.

Coversheet

Director of Operations Report

Section: II. Organizational Reports
Item: F. Director of Operations Report
Purpose: FYI
Submitted by:
Related Material: Operations Board Report 08_23_2022.pdf



PALISADES

CHARTER HIGH SCHOOL

Board of Trustees Meeting Operations Report August 23, 2022

Safety & Security:

- All Safety & Security management and reporting has been transitioned to Deans/Discipline Admin Brian Banducci

Permits & Setups:

Permit Revenue for June & July 2022: ~\$83,381

- ~\$39,646 from Facility Rentals
- ~\$27,205 from Iverbe Summer Camp Rental
- ~\$1,000 from Facility Parking Rental
- ~\$6,400 from Banner Rentals
- ~\$680 from One-Time Rentals
- ~\$8,450 from Filming
- Note: ~\$16,000 in Lost Revenue due to Facility Closure due to LAUSD Construction
- **Filming in June thru August:**
 - Still Photography (Martin Depict)
 - Production Parking (Base Camp)
 - HBO Documentary (Filming and Base Camp)
 - Time USA Doc
 - USA Women's Synchronized Swimming Team
 - Cologuard Commercial
- **(Potential) Filming for August:**
 - Still Photo Shoot
 - Commercial
- **Banners** - Demand continues strong, lots of new interest.
- **Fall Sports** – Picking up with practices, and games beginning the week of August 15th.
- **Permits** – Club Sports were limited in the gym over the summer but extremely steady in using our outdoor facilities (Stadium Field, Baseball Field and Tennis Courts) – were occupied daily.
- **Summer Closure(s):** Both the Large and Small Gym ended up being completely out of commission due to LAUSD construction from June 13-July 25, losing six full weeks and ~\$16,000 in Lost Revenue due to the LAUSD Construction.
- **August 2022 Set-Ups/Events:**
 - Teacher PD Days – August 15 & 16
 - 1st Day of School for All Students/Staff – August 17
 - 1st PCHS Home Football Game – August 19
 - New Parent Welcome Breakfast – August 20
 - Back to School Spirit Week – August 22-26
 - B&F Committee Meeting – August 22
 - Board Meeting – August 23



PALISADES

CHARTER HIGH SCHOOL

MGAC/Pool:

- Summer public lap swim hours will run through 8/31
- Schedule has been adjusted in accordance with SB328 and the later start for schools
- Pool closures first 2 weeks of Aug facilitated the replacement of all LED underwater pool lights (Comp Pool & Instructional Pool), chemical pump repairs/replacement, and additional necessary plumbing and electrical repairs
- MGAC lifeguards look forward to upcoming PE swim classes and PCHS water polo/swim activity
- ARC Lifeguarding and FA/CPR/AED classes continue to be available on demand

Transportation/Buses:

- The PCHS School Bus Program & Schedule, as well as Special Ed and Competition Buses, are underway. Schedules posted and almost all To/From School buses full.
- New traffic patterns due to new school start timing will likely require a few schedule/timing adjustments over the first few weeks.
- The Cost Sharing adjustments in the Late Bus and Competition Bus Programs are in place. Finance primarily handling the charge-back of Comp Buses to Teams, and Transportation managing the Late Bus charge-back to students/families.
- The next major deadline for the Transportation Program is the Wed 8/24 last day to Opt-Out without a full year obligation.

Information Technology:

- The Konica contract was approved by the Board at the Special BoT meeting on 4/28. The devices were ordered, we are hopeful that they arrive soon and we can cut over to the new machines. We know the old/outgoing ones are barely holding on.
- Replacement of Computer Lab computers has begun. Not all ordered have arrived, and most we do have came in the week before school started. We will rollout as quickly as we can.
- Some of the new laptops for Faculty and Staff arrived the day before school started. IT hopes to be able to begin work and deployment of these in a few weeks.
- Setup and configuration of two new services, e-Hallpass and STOPit! Anonymous Reporting occurred over the recent weeks. IT will be working with the Administration and Deans Office on additional configuration and training before handing off the applications.
- Continuing to support PRA requests/searches as needed.
- IT continues to work with Ms. Iannessa on the planning and roll out of the Promethean Interactive Displays. We are hoping to receive the 45 panels at the end of August or right after Labor Day.



PALISADES

CHARTER HIGH SCHOOL

Information Technology:

- Working with cafeteria vendor Chartwells and the CBO, we are planning a much-needed uplift of the cafeteria Point-of-Sale (POS) systems. The current systems are aged beyond support and have swollen batteries, screen breakage, or other issues that prevent them from being usable for service. New devices that are compatible with the recent changes to Infinite Campus POS 2.0 are being explored.
- The Tech Department completed multiple rounds of classroom and office moves and rewired every classroom teacher station over the summer.
- IT supported and participated in the 2022-23 Freshman and New Student Orientations, giving multiple talks to all present students throughout the day, informing them about student accounts, systems access, account security, how to log into Infinite Campus to retrieve their schedules, ID's, and locker information, how to check out a device if needed, and where and what types of support the Tech Office can provide.
- The Tech Department is primarily occupied with student device checkouts, as is customary at the start of the year, and supporting teachers/classrooms in starting up the school year. Due to these very-consuming activities, other non-critical support needs are on hold.

Facilities/Projects:

HVAC: Continued Evaluation of HVAC & Ventilation Systems

- **Other HVACC related Items:**
 - **Annual Bldg. duct cleaning** - completed per 5-year rotation
 - **Annual AC PM** -Completed for 40 units.
 - **MERV-13 Filters** ongoing Monthly Inspecting & Replacing
 - **E-Bldg.** – Return Fan motor replaced.
 - **Class thermostats** - Replaced (13) campus wide
 - **A-Bldg.** – Air compressor capacitor needs to be replaced. Capacitor on back order.

Facilities/Projects – OTHER:

- **Door Replacements:** U111, U113, U114 & Pali Academy B&G Restrooms doors replaced
- **Roofing:** Re-roofed U116 and patched U115, U114, U113, W119 and W120
- **Flooring:** Tile replaced for U111, U112, U118 and patched U116, E106 & E104
- **Hazardous Waste Pick Up:** End of year pick up completed.
- **Cafeteria:** Oven skillet repaired
- **Cafeteria:** Ice machine repaired
- **Landscaping:** Main irrigation shut off system repaired after multiple irrigation line breaks.
- **Landscaping:** Annual Summer brush clearance completed.



PALISADES

CHARTER HIGH SCHOOL

Facilities/Projects – OTHER:

- **Painting:** (5) classrooms were fully painted; U-Bungalow & Pali Academy ramps painted with anti-slip paint. Various summer survey requests for small areas in various rooms also painted.
- **Teacher Desk** – Provided new teacher desk for D101

Facilities/Projects – OTHER (Ongoing Maintenance):

- **Pali Academy** - Basketball court drainage; seepage and sump pump maintenance
- **Transporting Nutrition & Lunch** – Facilities delivers meals to Pali Academy twice a day
- **Baseball Batting Cage & Tennis-Court Drainage Gutter** – Weekly sweeping/cleaning routine
- **Stadium Turf** - Weekly field maintenance on going and will continue as normal
- **Tent Set-Ups** - Security Stations and COVID Testing Stations after wind-related take-downs
- **Hallway & PE Locker Maintenance** – Support/resolve daily locker maintenance requests
- **IPM Pest Management** – Significant degree of baiting exterior of Bldgs. for ants and roaches using *LAUSD approved products only*.

Facilities/Projects - Items set to begin and/or in progress with expected completion soon

- **E106 Washer/Dryer replacement**
- **Baseball batting cages net replacement**
- **New Furniture Ordered:** Student Desk Assembly & Deployment once arrived
- **J-Bldg.:** HVACC Compressor replacement

Facilities/Projects - Larger Scale Projects:

- **Underground Utilities Piping Replacement Project (LAUSD Bond Funded).**
 - All Major Phases Completed
 - Building cutovers continuing into Mid-Sep
 - Project completion expected by end of Sep 2022

Facilities/Projects - Larger Scale Projects:

- **Gym A/C Project (LAUSD Bond Funded):**
 - Phase 1 started on Fri 12/17/2021. The Boys side of the Gym Complex is underway and anticipated to last until Nov 2022.
 - Phase 2 in the Main Gyms is virtually completed. A few isolated days at various points in time to tie into the main systems.
 - Phase 3 in the Girls Locker Room side of the Gym Complex to begin in Nov 2022. At that time, the Boys Side personnel will move back into their regular locations in the Gym Complex and the Girls' Side personnel will be relocated to the Trailers by the Pool.
- **Campus-Wide Non-Bungalows A/C Project (LAUSD Bond Funded):**
 - This project LAUSD Board approval. The project now moving into the Architecture & Engineering phase to design
 - Once DSA Approval received, the project will be Bid & Awarded, which could take another 3-4 Months. Project not expected to start until Summer 2024

Coversheet

Director of Development Report

Section: II. Organizational Reports
Item: H. Director of Development Report
Purpose: FYI
Submitted by:
Related Material: Development Board of Trustees Report 08_23_2022.pdf
Development Board of Trustees Final Report 06_30_2022.pdf
2022_2023 Strategic Development Report.pdf



PALISADES

CHARTER HIGH SCHOOL

Development Report Board of Trustees Meeting August 23, 2022

Report date: 8/18/2022

TOTAL FUNDS RAISED TO DATE:	Fund	Prior Report	YTD	Inc/Dec.	Budget
The PCHS Fund	General	\$0	\$46,456	\$46,456	\$450,000
Pali Alumni Fund	General	\$0	\$1,086	\$1,086	
TOTAL UNRESTRICTED FUNDS RAISED		\$0	\$47,542	\$47,542	\$450,000
CTE Incentive Grant	General	\$0	\$270,372	\$270,372	\$0
Perkins V Grant	General	\$0	\$0	\$0	\$0
Rest. Donations/Pledges - Recd	General	\$0	\$0	\$0	0
Rest. Donations/Pledges	General	\$0	\$0	\$0	0
TOTAL RESTRICTED FUNDS RAISED		\$0	\$270,372	\$270,372	\$0
TOTAL FUNDS RECEIVED		\$0	\$317,914	\$317,914	\$500,000

TOTAL EXPENSES TO DATE:

Bacio Design	\$0	\$3,500
L.A. Press Printing	\$0	\$2,500
American Direct		
Mail	\$2,449	\$6,900
Postage	\$241	\$1,800
Subscriptions	\$0	\$7,800
SafeSave service fees	\$194	\$7,500
Salaries & Benefits (Campus Unification/Development Dir)	-	\$177,812
Office supplies	\$0	\$200
Videography	\$0	\$1,500
Family Donor Banners	\$0	\$700
Career Day & Fair Breakfast/Lunch	\$0	\$0
Donor Bricks	\$0	\$1,500
Donor Reception	\$0	\$0



PALISADES

CHARTER HIGH SCHOOL

Donor Refund	\$0	\$0
Pali High Booster Club (split donation)	\$0	\$0
New Parent Welcome Breakfast	\$0	\$0
TOTAL EXPENSES FOR UNRESTRICTED FUNDS	\$2,884	\$211,712

TOTAL NET FUNDS	\$315,030	\$288,288
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Comments and Campaigns initiated to date:

- 1.) Joint Appeal with Booster Club sent 8//8/22
- 2.) New Parent Welcome Breakfast scheduled for 8/20/22
- 3.) PCHS Fund comparison: **\$46,456** this year/**\$55,599** last year. Best YTD was **\$55,599**
- 4.) PCHS Fund donor comparison: **34** this year/**49** last year

Grants Submitted to date:

Grantor:	Amount	Purpose	Date Submit
CTE Incentive Grant	\$270,372.00	CTE Funds for 2022-213	1/15/2021
Pacific Palisades Women's Club	\$600.00	Mosaic repair	5/30/2022
Lewis A. Kingsley Foundation	\$10,000.00	Program Support	8/10/2022
	\$280,972.00		

*Red italic represents grant was not approved and deducted from the total outstanding grant requests

Grants Received to date:

Grantor:	Amount	Purpose	Date Rec'd
CTE Incentive Grant	\$270,372.00	CTE Funds for 2020-21	7/1/2022
Pacific Palisades Women's Club	\$600.00	Mosaic repair	7/27/2022
Lewis A. Kingsley Foundation	\$10,000.00	General support	7/10/2022
	\$280,972.00		



PALISADES

CHARTER HIGH SCHOOL

Year End Development Report Board of Trustees June 30, 2022

Report date: 6/30/2022

TOTAL FUNDS RAISED TO DATE:	Fund	Prior Report	YTD	Inc/Dec.	Budget
The PCHS Fund	General	\$378,762	\$453,105	\$74,343	\$450,000
Pali Alumni Fund	General	\$4,609	\$4,629	\$20	
TOTAL UNRESTRICTED FUNDS RAISED		\$383,371	\$457,734	\$74,363	\$450,000
CTE Incentive Grant	General	\$183,141	\$183,141	\$0	\$0
Perkins V Grant	General	\$37,861	\$37,861	\$0	\$0
Rest. Donations/Pledges - Recd	General	\$100,000	\$125,000	\$25,000	0
Rest. Donations/Pledges	General	\$15,000	\$15,000	\$0	0
TOTAL RESTRICTED FUNDS RAISED		\$336,002	\$361,002	\$25,000	\$0
TOTAL FUNDS RECEIVED		\$719,373	\$818,736	\$99,363	\$500,000

TOTAL EXPENSES TO DATE:

Bacio Design	\$4,932	\$3,500
L.A. Press Printing	\$0	\$2,500
American Direct Mail	\$1,530	\$6,900
Postage	\$1,094	\$1,800
Subscriptions	\$10,996	\$7,800
SafeSave service fees	\$7,812	\$7,500
Salaries & Benefits (Campus Unification/Development Dir)	\$177,812	\$177,812
Office supplies	\$199	\$200
Videography	\$0	\$1,500
Family Donor		
Banners	\$871	\$700
Career Day & Fair Breakfast/Lunch	\$0	\$0
Donor Bricks	\$295	\$1,500
Donor Reception	\$0	\$0
Donor Refund	\$6,180	\$0
Pali High Booster Club (split donation)	\$13,750	\$0



PALISADES

CHARTER HIGH SCHOOL

New Parent Welcome Breakfast	\$0	\$0
TOTAL EXPENSES FOR UNRESTRICTED FUNDS	\$225,471	\$211,712

TOTAL NET FUNDS	\$593,265	\$288,288
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GIVING SUMMARY BY DESIGNATION:	# of Donors	Ave. Amt.	Total Amt.
Campus Safety - COVID-19	3	\$1,439	\$4,318
Classroom Instructional Materials	6	\$374	\$2,242
Faculty & Staff Development	3	\$1,919	\$5,758
College Center	7	\$728	\$5,099
Greatest Need	269	\$1,449	\$388,458
Math Aides and Tutors	3	\$395	\$1,185
Technology and Innovation	66	\$549	\$36,260
Transportation Assistance	8	\$461	\$3,685
Visual and Performing Arts	9	\$678	\$6,102
	374		\$453,105

Comments and Campaigns initiated to date:

- 1.) Joint Appeal with Booster Club sent 8//21
- 2.) New Parent Welcome Breakfast was cancelled
- 3.) PCHS Fund comparison: **\$453,105** this year/**\$393,766** last year. Best YTD was **\$411,448**
- 4.) PCHS Fund donor comparison: **374** this year/**371** last year
- 5.) New Parent Zoom Presentation 9/11/21
- 6.) Follow up Email sent to all parents 9/13/21
- 7.) Letters to last year's Banner donors who have not donated to date 10/20/21
- 8.) Driveway Days scheduled for October 25 - 28 were cancelled due to drop off complications
- 9.) Major Donor Reception held on November 4th received \$51,000 in pledges with more to come
- 10.) \$60 for the 60th Anniversary Campaign to begin the week before #Giving Tuesday to alums & faculty/
staff and friends
- 11.) #Giving Tuesday Campaign to begin on November 21st
- 12.) #Giving Tuesday Campaign raised \$34,425.78
- 13.) \$60 for the 60th Campaign raised \$3,225 from faculty, staff, admin and alumni
- 14.) Year-End Campaign to begin on 12/27, 12/29, and 12/31
- 15.) Year-End Campaign brought in \$57,389.98



PALISADES

CHARTER HIGH SCHOOL

- 16.) Personal Phon-a-thon to begin on 3/15
 17.) PCHS Fund Board Member Thank-a-thon to begin on 3/31
 18.) Major Donor Reception to be held on Thursday, April 28th
 19.) Major Donor Reception brought in \$2,600 with \$15,000 of pledges outstanding
 20.) Final Letter appeal to be mailed to approximately 1,000 families on 5/25
 21.) Final appeal has brought in \$44,626 to date. Robocall and final email to go out this week.

Grants Submitted to date:

Grantor:	Amount	Purpose	Date Submit
CTE Incentive Grant	\$183,141.00	CTE Funds for 2020-21 Perkins Funds for 2020-	1/15/2021
Perkins V Grant	\$37,861.00	21	7/15/2021
<i>Non-Profit Security Grant</i>	<i>\$131,250.00</i>	<i>Perimeter Fencing</i>	<i>4/6/2021</i>
Pacific Palisades Women's Club	\$750.00	Mosaic repair	5/30/2022
Lewis A. Kingsley Foundation	\$10,000.00	Program Support Professional	8/10/2021
Mara W. Breech Foundation	\$5,000.00	Development	10/20/2021
William C. Bannerman Foundation	\$10,000.00	Disruptive Innovations	10/29/2021
Los Angeles Scholars Invest. Fund	\$150,000.00	Pali Bridges Program Challenge Grant for Transportation	5/3/2022
McGrath Abrams Family Found.	\$100,000.00	Assist	5/3/2022
	\$496,752.00		

*Red italic represents grant was not approved and deducted from the total outstanding grant requests

Grants Received to date:

Grantor:	Amount	Purpose	Date Rec'd
CTE Incentive Grant	\$183,141.00	CTE Funds for 2020-21	6/30/2021
Perkins V Grant	\$37,861.00	Perkins Funds for 2020-21	9/15/2021
Pacific Palisades Women's Club	\$250.00	Mosaic repair	7/27/2021
Lewis A. Kingsley Foundation	\$10,000.00	Vernier probes Project Professional	10/5/2021
Mara W. Breech Foundation	\$5,000.00	Development	1/16/2022



PALISADES

CHARTER HIGH SCHOOL

McGrath Abrams Family Found.	<u>\$25,000.00</u>	Grant for Transportation Endowment	6/13/2022
	\$261,252.00		

Federal Grant for \$1.5 million for increasing STEM access and involvement among women and special populations we created in collaboration with XYLO Academy was not approved. These grants are still pending:

Ronald W. Burkle Foundation	\$25,000.00	Disruptive Innovations	2/17/2021
Dorrance Family Foundation	\$25,000.00	Disruptive Innovations	2/17/2021
Van Konynenburg Foundation	\$25,000.00	Disruptive Innovations	2/17/2021
Eli & Edythe Broad Foundation	\$25,000.00	Disruptive Innovations	2/17/2021
M.B. Seretean Foundation	\$25,000.00	Disruptive Innovations	2/17/2021
Lawrence Foundation	\$5,000.00	Disruptive Innovations	2/17/2021



**STRATEGIC DEVELOPMENT PLAN
2022-2023**

The PCHS Fund

Goal A: Execute successful annual fund appeal that meets established goals for participation for faculty, board, parents, grandparents, alumni, friends and others. (Implementation: Director of Development supported by Executive Director, CBO and Board)

- Action Step 1: Generate fresh and exciting marketing approach by end of July with mailing set the first week of August.
- Action Step 2: Board members and members of the Development Committee to call friends and friends of friends to support The PCHS Fund.
- Action Step 3: Maintain yearly goal of 100% annual participation by board and faculty.
- Action Step 4: Strategically plan small group receptions with potential major donors.
- Action Step 5: Encourage annual fund donors to explore and, where possible, secure matching gifts through their employers.
- Action Step 6: Create campaign throughout the year to increase participation based upon needs and donor interest.
- Action Step 7: Take advantage of face-to-face opportunities (such as open houses, Back-to-School Night or other parent meetings) to highlight The PCHS Fund.
- Action Step 8: Develop appropriate and creative ways of acknowledging donors such a photo post cards and emailed video thank you.
- Action Step 9: Specify and promote improvements and/or purchases made possible by annual fund donations. Conduct parent survey at conclusion of campaign.
- Action Step 10: Specify specific uses of campaign funds to insure they are consistent with the long term strategic needs of the school and are in conjunction with the LCAP goals. **(LCAP Goal #2 and #20)**
- Action Step 11: Create a Corporate Sponsor program and acknowledge corporate sponsors on school website.
- Action Step 12: Create an annual development budget.

Alumni Relations

Goal A: Develop and implement opportunities for alumni to remain connected to PCHS.

(Implementation: Director of Development, Executive Director, Alumni Association and other faculty and staff well connected to alumni)

- Action Step 1: Update and improve Almbase platform on PCHS website that is an interactive network for all alumni engagement.
- Action Step 2: Recruit class agents (utilizing chairs of annual reunions), identify agent responsibilities, and capitalize on their abilities to improve communications between PCHS and alumni groups from each year since the school's inception.

- Action Step 3: Seek to have alumni return to campus as least once per year, capitalizing on athletic events, homecoming, drama productions and musical performances and graduation to generate increased interest.
- Action Step 4: Host multiple events in the area tailored to various generations of alumni such as hosting a legacy breakfast or acknowledging an Alumni of the Year.
- Action Step 5: Host annual alumni events outside of local area in areas where a high concentration of alumni live.
- Action Step 6: Communicate testimonials, news & updates, once per week for Pali->START program.

Goal B: Create and maintain an Alumni Network of interested and/or vested volunteers and focus their efforts on fundraising through special events and other collaborative means and select an Alumni Association President. (Implementation: Director of Development, Executive Director, Faculty and Staff)

- Action Step 1: Select new alumni board members with potential to measurably contribute to fundraising activities and outreach to alumni base.
- Action Step 2: Cultivate a mindset of advancement and increased understanding of fundraising principles in Alumni through proactive education by Director of Development and Alumni class agents.
- Action Step 3: Take advantage of alumni class agent's influence on alumni base by involving them in the promotion of alumni participation in annual fund and planned giving programs.
- Action Step 4: Encourage local alumni involvement and inclusion in auction and other school-led fundraising efforts.
- Action Step 5: Implement a new fall fundraising event (2019) coordinated by alumni board such as a golf tournament where the proceeds are designated for some very specific need or goal.
- Action Step 6: Communicate successes and leadership of the alumni to the greater PCHS community.

Planned giving

Goal A: Research and pursue opportunities for planned giving. (Implementation: Director of Development)

- Action Step 1: Utilize school website that explores the following opportunities for planned giving: bequests, gift annuities, life insurance (existing and new policies), revocable trust, charity remainder trusts, IRA and 401k.
- Action Step 2: Generate target mailings for each planned giving vehicle and calendar potential mailing dates.
- Action Step 3: Added planned giving to "Ways to Give" section of school website.

Grants

Goal A: Research and pursue grant opportunities through foundations, corporate giving programs and federal and state sources (where feasible). (Implementation: Director of Development, Executive Director, Development Committee and volunteer grant writers)

- Action Step 1: Create a grant writing committee focused on researching funders, writing proposals and reporting on funds received in conjunction with the efforts of the Director of Development.
- Action Step 2: Establish grants calendar with target goals (quantity/dollar amounts) for each fiscal year (by July each year).
- Action Step 3: Work with staff and faculty to understand curriculum, projects, innovations, and future goals in order to match funding opportunities with the appropriate needs.
- Action Step 4: Communicate grant successes to PCHS community and greater public.

Capital Campaign

Goal A: Prepare for and execute capital campaign based on needs identified by strategic plan.

(Implementation: Director of Development, Executive Director, in conjunction with committee chairs and volunteers assisting in the development effort).

- Action Step 1: Communicate contents of strategic plan to parents and prospective donors in advance of campaign launch.
- Action Step 2: Compile database that incorporates potential campaign donors with specific research on each individual including projected levels of giving and areas of interest.
- Action Step 3: Development capital campaign committee and designate a strong volunteer chairperson. These should be carefully selected individuals who will shape campaign strategy, help cultivate prospects, advice on campaign publications, and assist in articulating goals and needs of the capital campaign to the greater donor pool. These individuals preferably have had previous experience in this area.
- Action Step 4: Initiate campaign five years prior to start of project and secure 50% of funds prior to start of campaign.

Endowment

Goal A: Pursue donations to an endowment fund in order to grow principal by 5% per year.

(Implementation: Director of Development)

- Action Step 1: Direct prospective planned giving donors to prioritize gifts and bequest to the endowment fund.
- Action Step 2: Identify donors for endowment from broad pool of prospects, reviewing list on quarterly basis. Prospects shall include individuals (current and former parents and grandparents), alumni, corporations, and foundations.
- Action Step 3: Consider launching new alumni event that generates proceeds dedicated to endowment growth (i.e. reunions, homecoming, special events)
- Action Step 4: Use capital campaign as an opportunity to raise endowment funds as part of the overall campaign goal.
- Action Step 5: Donate 10% or more of gifts to The PCHS Fund, as well as proceeds from auction and other special events and fundraisers to the endowment.

Development Operations

Goal A: Improve communications between Development and the greater PCHS community.

(Implementation: Director of Development, Executive Director, Admin. Asst. - Communications)

- Action Step 1: Maintain and continually update list of funding needs of school.
- Action Step 2: Carefully devise means of articulating funding needs or varying levels and scope to designated donor pool.
- Action Step 3: Educate and inspire members of the development effort to serve as liaisons to possible fundraising opportunities and ambassadors to improved donor and prospect relations.
- Establish a Development Committee of members with previous development experience and are well connected to the community at large. Involve at least one (1) board member, (1) parent, (1) Booster Club member and (1) Alumni Association member.

FUNDRAISING HISTORY



PALISADES
CHARTER HIGH SCHOOL

Category	2015	%	2016	%	2017	%	2018	%	2019	%	2020	%	2021	%	2022	%
Parent Donations	\$42,190	77%	\$15,879	58%	\$87,956	15%	\$228,812	33%	\$253,127	62%	\$414,100	61%	\$366,841	58%	\$447,621	55%
Foundation Grants	\$0	0%	\$0	0%	\$55,000	9%	\$10,000	1%	\$20,000	5%	\$8,300	1%	\$24,500	4%	\$42,750	5%
Board Donations	\$0	0%	\$0	0%	\$1,929	0%	\$15,510	2%	\$0	0%	\$0	0%	\$1,121	0%	\$260	0%
Faculty & Staff Donations	\$0	0%	\$0	0%	\$1,632	0%	\$321	0%	\$0	0%	\$0	0%	\$527	0%	\$950	0%
Corporate Donations	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
CTE Grants	\$0	0%	\$0	0%	\$379,711	64%	\$268,416	38%	\$0	0%	\$171,045	25%	\$173,107	27%	\$183,141	22%
Perkins Grant	\$0	0%	\$0	0%	\$28,120	5%	\$24,736	4%	\$29,750	7%	\$37,102	5%	\$34,746	5%	\$37,861	5%
Special Events (Net proceeds)	\$12,543	23%	\$11,575	42%	\$12,515	2%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
Stadium Renovation Project	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
Donor Brick Campaign	\$0	0%	\$0	0%	\$24,850	4%	\$100,333	14%	\$4,071	1%	\$250	0%	\$0	0%	\$1,500	0%
Restricted Gifts Received	\$0	0%	\$0	0%	\$0	0%	\$50,859	7%	\$99,151	24%	\$49,468	7%	\$35,607	6%	\$100,000	12%
TOTAL PROCEEDS	\$54,733	100%	\$27,454	100%	\$591,713	100%	\$698,987	100%	\$406,099	100%	\$680,265	100%	\$636,449	100%	\$814,083	100%
Postage expense	\$0	0%	\$0	0%	\$1,549	6%	\$6,136	12%	\$3,038	6%	\$3,648	12%	\$1,732	7%	\$1,094	4%
Paper expense	\$0	0%	\$0	0%	\$105	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
Design & Marketing	\$0	0%	\$0	0%	\$5,875	24%	\$8,300	17%	\$6,705	13%	\$3,600	12%	\$3,710	16%	\$4,932	18%
Printed Materials	\$0	0%	\$0	0%	\$1,621	7%	\$7,745	15%	\$10,746	22%	\$5,703	19%	\$3,049	13%	\$1,530	6%
Donor Perfect	\$0	0%	\$0	0%	\$3,057	13%	\$2,496	5%	\$2,496	5%	\$5,086	17%	\$2,129	9%	\$4,098	15%
Foundation Directory Online	\$0	0%	\$0	0%	\$999	4%	\$999	2%	\$1,499	3%	\$0	0%	\$0	0%	\$0	0%
Almabase	\$0	0%	\$0	0%	\$999	4%	\$5,000	10%	\$0	0%	\$0	0%	\$7,500	32%	\$7,500	28%
Classy	\$0	0%	\$0	0%	\$999	4%	\$3,588	7%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
California Consulting	\$0	0%	\$0	0%	\$999	4%	\$9,000	18%	\$17,688	35%	\$0	0%	\$0	0%	\$0	0%
Professional Development	\$0	0%	\$0	0%	\$585	2%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
Give away items	\$0	0%	\$0	0%	\$5,641	23%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%
Advertising	\$0	0%	\$0	0%	\$0	0%	\$2,327	5%	\$670	1%	\$1,515	5%	\$0	0%	\$0	0%
Donor Bricks	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$0	0%	\$2,050	7%	\$0	0%	\$100	0%
Office Supplies	\$0	0%	\$0	0%	\$225	1%	\$0	0%	\$286	1%	\$0	0%	\$0	0%	\$0	0%
Transaction fees	\$0	0%	\$0	0%	\$1,730	7%	\$4,626	9%	\$6,725	13%	\$8,793	29%	\$5,247	22%	\$7,812	29%
TOTAL EXPENSES	\$0	0%	\$0	0%	\$24,384	100%	\$50,217	100%	\$49,853	100%	\$30,395	100%	\$23,367	100%	\$27,066	100%
TOTAL NET PROCEEDS	\$54,733	100%	\$27,454	100%	\$567,329	96%	\$648,770	93%	\$356,246	88%	\$649,870	96%	\$613,082	96%	\$787,017	97%



5 Year Goals

Category	2021	2022	2023*	2024*	2025*	2026*
Parent Donations	\$366,841	\$447,621	\$492,383	\$541,621	\$595,784	\$655,362
Foundation Grants	\$24,500	\$42,750	\$47,025	\$51,728	\$56,900	\$62,590
Board Donations	\$1,121	\$260	\$286	\$315	\$346	\$381
Faculty & Staff Donations	\$527	\$950	\$1,045	\$1,150	\$1,264	\$1,391
Corporate Donations	\$0	\$0	\$0	\$0	\$0	\$0
CTE Grants	\$173,107	\$183,141	\$270,372	\$283,891	\$298,085	\$312,989
Perkins Grant	\$34,746	\$37,861	\$37,861	\$39,754	\$41,742	\$43,829
Special Events (Net proceeds) -						
Promotions	\$0	\$0	\$0	\$0	\$0	\$0
Restricted Gifts	\$35,607	\$100,000	\$100,000	\$0	\$0	\$0
Donor Brick Campaign	\$0	\$1,500	\$5,000	\$2,500	\$2,500	\$2,500
TOTAL PROCEEDS	\$636,449	\$814,083	\$953,972	\$920,958	\$996,621	\$1,079,042
Postage expense	\$1,732	\$1,094	\$1,203	\$1,324	\$1,456	\$1,602
Paper expense	\$0	\$0	\$0	\$0	\$0	\$0
Design & Marketing	\$3,600	\$4,932	\$3,710	\$3,896	\$4,090	\$4,295
Printed Materials	\$3,049	\$1,530	\$1,683	\$1,851	\$2,036	\$2,240
Donor Perfect	\$5,086	\$4,098	\$0	\$0	\$0	\$0
Foundation Directory Online	\$0	\$0	\$1,499	\$1,499	\$1,499	\$1,499
Almabase	\$0	\$7,500	\$7,500	\$7,500	\$0	\$0
Virtuous	\$0	\$0	\$14,388	\$9,600	\$9,600	\$9,600
California Consulting	\$0	\$0	\$0	\$0	\$0	\$0
Professional Development	\$0	\$0	\$0	\$0	\$0	\$0
Give away items/Advertising	\$0	\$0	\$500	\$500	\$500	\$500
Donor Bricks	\$0	\$100	\$500	\$500	\$500	\$500
Office Supplies	\$0	\$0	\$250	\$250	\$250	\$250
Transaction fees	\$5,247	\$7,812	\$8,593	\$9,453	\$10,398	\$11,438
TOTAL EXPENSES	\$21,867	\$21,867	\$39,827	\$36,372	\$30,330	\$31,923
TOTAL NET PROCEEDS	\$614,582	\$792,216	\$914,146	\$884,586	\$966,292	\$1,047,119



2016-2017

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members-7	72.70%	\$241.12	19.30%	\$1,929.00
Faculty-100	100.00%	\$13.16	135.90%	\$1,632.13
Parents-225	8.70%	\$375.09	24.90%	\$84,394.87

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest	Lowest
100 90024	9	3.60%	\$316.67	\$700.00	\$50.00
142 90025	11	4.80%	\$377.73	\$1,000.00	\$5.00
375 90049	40	17.80%	\$338.63	\$1,000.00	\$25.00
83 90064	13	5.30%	\$394.23	\$2,100.00	\$50.00
144 90066	14	5.90%	\$257.46	\$700.00	\$10.00
43 90077	4	0.40%	\$400.00	\$1,050.00	\$100.00
579 90272	92	41.20%	\$366.72	\$5,000.00	\$10.00
61 90290	7	2.90%	\$171.43	\$350.00	\$25.00
49 90291	10	4.10%	\$265.00	\$700.00	\$15.00
1103 Other	32	14.00%	\$225.11	\$1,050.00	\$5.00
Total Families:	225	8.72%			

2017-2018

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members - 2	18.18%	\$7,755.00	103.40%	\$15,510.00
Faculty - 7	5.46%	\$45.84	21.39%	\$320.85
Parents - 630	24.34%	\$389.83	59.36%	\$296,842.32

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest
74 90401	20	3.17%	\$307.64	\$1,061.50
725 90025	29	4.60%	\$378.21	\$1,361.53
630 90049	76	12.06%	\$945.66	\$15,000.00
101 90064	14	2.22%	\$199.96	\$623.15
130 90066	27	4.29%	\$196.40	\$716.00
46 90077	5	0.79%	\$317.20	\$511.00
565 90272	212	33.65%	\$740.10	\$7,757.50
108 90290	9	1.43%	\$211.01	\$1,113.00
51 90291	5	0.79%	\$255.50	\$510.00
265 Other	233	36.98%	\$225.11	\$1,050.00
Total Families:	630	24.04%		

2018-2019

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members - 6	60.00%	\$1,121.33	48.50%	\$6,728.00
Faculty - 28	20.89%	\$116.82	218.07%	\$3,271.00
Parents - 662	25.17%	\$527.42	71.55%	\$349,151.00

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest	Lowest
77 90401	29	4.38%	\$836.26	\$2,027.50	\$20.00
249 90025	49	7.40%	\$373.77	\$2,027.50	\$20.00
366 90049	95	14.35%	\$612.78	\$6,770.00	\$25.00
103 90064	24	3.63%	\$574.74	\$2,976.00	\$51.50
135 90066	35	5.29%	\$253.55	\$1,051.50	\$20.60
47 90077	9	1.36%	\$697.18	\$2,250.00	\$50.00
574 90272	224	33.84%	\$1,193.79	\$15,000.00	\$20.60
116 90290	16	2.42%	\$255.57	\$1,151.50	\$20.60
963 Other	180	27.19%	\$387.63	\$5,000.00	\$20.60
Total Families:	662	25.17%			

2019-2020

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members - 6	60.00%	\$2,999.97	90.00%	\$17,999.80
Faculty - 3	2.00%	\$105.75	21.15%	\$317.25
Parents - 486	27.70%	\$633.85	90.62%	\$453,105.13

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest
79 90401	25	5.14%	\$1,208.93	\$10,300.00
271 90025	29	5.97%	\$547.87	\$5,150.00
362 90049	74	15.23%	\$1,305.02	\$12,360.00
106 90064	16	3.29%	\$1,270.66	\$5,150.00
111 90066	15	3.09%	\$577.07	\$2,000.00
42 90077	7	1.44%	\$1,107.29	\$5,000.00
599 90272	188	38.68%	\$1,051.21	\$12,000.00
107 90290	11	2.26%	\$241.25	\$1,000.00
1041 Other	121	24.90%	\$602.92	\$3,010.00
Total Families:	486	17.88%		

2020-2021

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members - 3	25.00%	\$441.33	13.24%	\$2,648.00
Faculty - 3	2.00%	\$105.75	69.20%	\$1,730.00
Parents - 371	11.75%	\$633.85	98.25%	\$392,988.58

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest	Lowest
99 90401	18	4.85%	\$1,149.83	\$4,223.00	\$103.00
318 90025	27	7.28%	\$1,112.92	\$5,000.00	\$51.50
435 90049	51	13.75%	\$1,457.34	\$10,300.00	\$103.00
129 90064	20	5.39%	\$998.05	\$5,000.00	\$103.00
146 90066	22	5.93%	\$587.30	\$2,095.00	\$10.30
40 90077	4	1.08%	\$1,048.25	\$4,525.50	\$154.50
711 90272	137	36.93%	\$1,566.00	\$12,309.00	\$36.05
110 90290	13	3.50%	\$358.54	\$1,300.00	\$30.60
1169 Other	79	21.29%	\$889.93	\$5,150.00	\$10.30
Total Families:	371	11.75%			

2021-2022

<u>Participation by Group:</u>	% Part.	Ave. Gift	% of Goal	\$ Raised
Board Members - 2	16.67%	\$44.63	1.34%	\$267.80
Faculty - 4	3.25%	\$105.75	38.02%	\$950.55
Parents - 374	11.39%	\$633.85	100.69%	\$453,106.13

Participation by Zip Code:

Total Families by Zip Code	% of Total Families	% of Families in Zip Code	Ave. \$ Gift	Highest
110 90401	18	4.81%	\$1,149.83	\$4,223.00
293 90025	27	7.22%	\$1,112.92	\$5,000.00
462 90049	51	13.64%	\$1,457.34	\$10,300.00
127 90064	20	5.35%	\$998.05	\$5,000.00
143 90066	22	5.88%	\$587.30	\$2,095.00
52 90077	4	1.07%	\$1,048.25	\$4,525.50
695 90272	137	36.63%	\$1,566.00	\$12,309.00
114 90290	13	3.48%	\$358.54	\$1,300.00
1287 Other	82	21.93%	\$889.93	\$5,150.00
Total Families:	374	11.39%		



Goal Setting Guide
School Year 2022-23

Goals for Foundation Funding

Foundation	Type	Status	Request	Likelihood
William C. Bannerman	Program Support	Albert I.O. License	\$5,000	50%
SONY Corporatoin	Fim/Media	New source	\$15,000	50%
Cathay Bank Foundation	ESL support	Juan Pablo	\$5,000	75%
Albert & Elaine Borchard Fdn.	Performing arts	Will call foundation	\$10,000	50%
Mara W. Breech Foundation	Professional Development	Supported PD 2021-22	\$10,000	100%
Ahmanson Foundation	Academic Equity	Will call foundation	\$25,000	30%
LA Scholars Investment Fund	Pali Bridges Program	Spoke to program director	\$150,000	50%
CIGNA Health Foundation	Healthier Kids - Mental Health	Discussed with Tammie	\$10,000	50%
Toshiba Foundation	MakerSpace	Supports project based learning	\$25,000	50%
Dr. Seuss Foundation	Improving literacy & learning	Discuss with Monica I.	\$10,000	50%
Lewis A. Kingsley Foundation	Greatest Need	Supported 2016-2021	\$10,000	100%



School Year 2022-23

Goals for Donor Development

Strategy	Goal	Audience	Description
Alumni Fund	100 Alums @\$50 = 5,000	New Pali Alumni Network webpage	Homecoming/Reunions/#Giving Tuesday/Year-End Campaign
Renew current donors	178 parents @\$2,215 ave = \$394,150	Initial appeal & follow up; eNewsletter & Robocall reminders	Board and Dev. Committee members to identify and call renewing families
Acquire 5 new major donors	5 new donors @ \$5,000 = \$25,000	Reception at Brentwood Country Club/Personal Appeal	Major Donor Reception/Individual meetings w/ Dr. Magee
Increase participation of 90272 zip code by 3.37%; 90049 zip code by 2.96%; and 90024 zip code by 0.08%	47 donors @\$1,000 = \$47,000	Concerted effort of board members, development committee members/Donor receptions	Identify major donors from Paul Revere Middle School in addition to existing families
Continue to engage Alumni to join the Alumni network	Essentially free money for purchases made by alums using this service	Free online membership service	We will be able to direct market our campaign(s) through this website
Goal of 30% participation from incoming 9th grade families	239 donors @ \$500 = \$119,500	New Parent Breakfast/Back-to-School Night/Registration in August	Will work with Rene Rodman to assist with former PRMS parents
Legacy Wall donation from alumni and current athletes	5 donors @500 = \$2,500	488 total athletes (football, soccer, lacrosse, softball, track & Field) represents 17.2% of total student body and 45% of all athletes	Direct mail campaign to parents of these athletes (minus those on scholarship)

#Giving Tuesday	100 donors @ \$350 = \$35,000	Social Media campaign using Facebook and Twitter; one day campaign	Secure a donor willing to match up to \$5,000
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Dollar Range	2020-21	2021-22	Projected 2022-23
\$1,000	73	84	
\$1,200 - \$1,500	26	24	25
\$2,000 - \$3,900	34	49	50
\$4,000 - \$5,000	10	14	15
\$5,001- \$9,999	2	0	5
\$10,000+	8	7	8

School Year 2022-23



Goals for Corporate Development

Strategy	Goal	Audience	Description
Acquire new donors through CTE Advisory Committee	5 new donors average \$1,000 = \$5,000	Current CTE Advisory Committee members and/or their associations with outside businesses	Engage committee members with campaign by sending them campaign marketing piece
Identify banks, realtors, doctors, dentists and financial firms for permanent signage in Stadium by the Sea and Sponsorship on PCHS website	5 donors @\$1,000; 10 donors @\$500 = \$10,000	Personal outreach with support from Board members and Development committee members	Board and Dev. Committee members to identify and call renewing families
Identify current and past parents who own businesses	10 new donors @\$500 = \$5,000	Personal outreach with support from Board members and Development committee members. Donor receptions	Board and Dev. Committee members to identify
Identify current vendors as donors	3 new donors @\$1,000 = \$3,000	Purchasing and Facilities to identify possible sources	Direct solicitation from school personnel



School Year 2022-23

Goals for In-Kind Gifts

Strategy	Goal	Audience	Description
Acquire gifts in kind to offset budget items	Operational needs: Landscape architects, landscaping, Construction architect, Contractors, General Contractors (plumbing, electrical, concrete, asphalt, painting, carpentry, floor tile, ceiling tile, drywall, stucco, asbestos removal/handling, fencing, signage - building, parking, school furniture suppliers, ADA/DSA consulting)	Current parent base	Publish needs/wish list regularly on website and parent newsletter.

Coversheet

Chief Business Officer (CBO) Report

Section: II. Organizational Reports
Item: I. Chief Business Officer (CBO) Report
Purpose: FYI
Submitted by:
Related Material: CBO Board Report 08_23_2022.pdf



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CBO Report Board of Trustees Meeting August 23, 2022

2021-2022 UNAUDITED ACTUALS

- PCHS is in the final stages of closing out the 2021-2022 fiscal year. Our unaudited actuals report is due to LAUSD by 8/26/22. This report presents a look at our 2021-2022 final expenditures. Both LAUSD and our auditors will review our report and follow-up for additional information.
- We ended the year with a positive ending balance of \$2,020,136. Please note, this amount is significantly inflated because PCHS received restricted funds (grants, relief funding, etc.) that we had to account for in 2021-22, yet the expenses will not incur until 2022-23 and beyond.
- Of the \$2.02 Million positive ending balance, \$1.534 Million of it was restricted funds.
 - Educator Effectiveness Funds: \$397,553
 - A-G Completion Grant (Access/Success): \$421,507
 - A-G Completion Grant (Learning Loss): \$62,636
 - Ethnic Studies Block Grant: \$76,392
 - Supply Chain Assistance Grant: \$74,219
 - Child Nutrition: Kitchen Infrastructure Grant: \$27,000
 - Expanded Learning Opportunities Grant: \$475,182
- Some of the restricted funding sources above require board approved expenditure plans.

2022-2023 BUDGET UPDATE

- This item is included as a separate agenda item.
- The revised budget now includes the updated LCFF calculator and accounts for new assumptions and the impact of UTLA bargaining.
- There is a projected positive ending balance of \$343,155. This ending balance does not include the following: (1) impact of PESPU or unrepresented salary adjustments and (2) one-time funds included in the 22-23 state budget (because the allocations are not finalized).

FINANCE OFFICE TRANSITIONS

- Our Finance Director, Arleta Ilyas, has moved on to another great opportunity. Her leadership, skillset and passion will greatly be missed.

INVESTMENT OF RETIREE FUND

- As part of the recent CSD Oversight visit, LAUSD acknowledged our retiree benefit investment fund, but recommended that we establish a trust.
- We previously did not establish a trust because (1) we were in the process of evaluating multiple retiree benefit options and (2) the priority was to invest the current funds.
- We will evaluate three trust administrators based on feedback from our actuary, investment manager and K-12 referrals.
- Please note, the process is rigorous and there will be attorney/trust fees involved.



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COMPLIANCE

- The independent audit for 2021-22 is underway. We are hopeful for no findings this year.
- The actuarial valuation for 2021-22 is also in process. We are working closely with the actuary to provide updated census data and financial information.
- Lastly, the 2021-22 CSD Oversight Report is finalized. PCHS earned a 2 out of 4 in the Fiscal section. That is technically the highest rating that PCHS was eligible to receive as a result of 2 audit findings within the past 2 years. See below:
 - In 2019-20, PCHS received an audit finding for non-classroom-based instruction
 - Two independent study contracts were signed after the start of the school year.
 - In 2020-21, PCHS received an audit finding for Unduplicated Pupil Count: EL student
 - One student was not classified correctly, and the auditor acknowledged it was a clerical oversight.
- As a result of the above past findings, the maximum PCHS could receive was a 2 out of 4.

LOOKING AHEAD

- Over the next few weeks, finance will be evaluating:
 - 5-year textbook adoption cycle
 - 10-year furniture purchase plan
 - Deferred maintenance funding schedule
 - Ed Tech funding schedule
 - Will work with Datalink Networks (technology consultant who has K-12 experience) to refine the Ed Tech plan and evaluate funding scenarios.
- The one-time funds included in the 2022-23 state budget will be finalized soon. Once available, we will gather feedback from all educational partners and work with LTSP and budget committees to develop a spending plan.

Coversheet

Executive Director/Principal (EDP) Report

Section: II. Organizational Reports
Item: J. Executive Director/Principal (EDP) Report
Purpose: FYI
Submitted by:
Related Material: EDP Board Report 08_23_2022.pdf



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Executive Director/Principal Report Board of Trustees Meeting August 23, 2022

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.

Welcome to the 2022-2023 school year!

Areas of focus for the new school year are positive behaviors and learning acceleration along with the PALI values: Positivity, Aspiration, Learning, and Integrity applied through an equity lens. These themes were woven throughout the workshops and presentations designed to prepare faculty and staff for the reopening of school in August.

Preparations for the 2022-2023 School Year

Teachers, staff, and administrators led and participated in summer workshops during June, July, and August. Some of the many trainings include

- Positive Behavior Interventions and Supports (PBIS) Summer Workshops
- Admin Team Vision & Mission Meeting - August 2
- New Teacher and Staff Onboarding - August 4 and 5
- Virtual Orientation for all families - August 8
- Link Crew Orientation for 9th graders and students new to PCHS - August 9
- Back to School Professional Development - August 15 and 16

Rotation session topics:

1. Equity, implicit bias, and growth mindset
2. Positive Behavior Intervention and Supports
3. Attendance Policy
4. Safety
5. Council Check-in

Pali High Parent Organizations also welcomed families to the new school year with a variety of events designed to build community and provide information.

- PTSA/Meet the Administrators – Thursday, August 18
- New Parent Breakfast sponsored by PCHS Fund – Saturday, August 20
- UPCOMING Booster Club Kick Off – Wednesday, August 31

STOPit

We are pleased to announce that PCHS has enrolled with STOPit, by STOPit Solutions. [STOPit](#) is an online reporting tool designed to deter and mitigate bullying, cyber abuse, and other inappropriate behaviors, consisting of an app and a back-end incident management system for school administrators. Our students will have access to the STOPit mobile app, which has two simple but powerful features.

Specifically, the program educates students to:

- Recognize the signs of at-risk behaviors



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- Take every sign and signal seriously
- Report it anonymously through STOPit App/Web or 24/7 Incident Response Center
- Submit photo or video evidence (App/Web Only)
- Alert designated administrators to issues and risks early, before they escalate.

No personal information is needed to use STOPit. The only way personally identifiable information will be accessible through STOPit is if a requester voluntarily includes it within the content of a request or message.

Both our school and STOPit are committed to protecting the privacy of student data. STOPit is a signatory to the [Student Privacy Pledge](#), spearheaded by the Future of Privacy Forum and the Software & Information Industry Association. You may review STOPit's [Privacy Policy](#) for details, including more information on how anonymous reporting works.

Students have the power to help put an end to harmful and inappropriate behavior they see online through social media and other means. They can use STOPit to reach out for help if they or a peer are facing a personal crisis or experiencing bullying, abuse, or are otherwise in need of assistance. Our goal with STOPit is to create safer, kinder, school communities both online and off. The new system will be introduced to students and parents in the coming weeks.

Admin Team Updates

Welcome to two new members of the administrative team!

- Brian Banducci – Assistant Principal for Activities, Athletics, and Discipline
- Dr. Martha Monahan – Human Resources Director

The Assistant Principal for Admissions and Attendance is currently on leave. Duties are being covered by the incredible Attendance Office staff and admin team with support from a consultant.

AALRR Virtual Leadership Series – All administrators are participating as a team in monthly training addressing the following topics:

- Communicating with Difficult People and Influencing Change
- Managing and Addressing Conflict between Employees in the Workplace
- Effective Evaluations and Evaluation Meetings
- Preparing, Delivering and Monitoring Employee Improvement Plans
- Team Building and Trust Building Tips that will Transform Your Department or School Site
- From Supervisor to Leader: Responsibilities, Repairing Relationships, and Infusing the Practice of Civility
- Troubleshooting Leadership: How to Lead Notwithstanding Challenging People and How to Lead in Challenging Circumstances.

Coversheet

PCHS Attendance Policy

Section: V. Academic Excellence
Item: B. PCHS Attendance Policy
Purpose: Vote
Submitted by:
Related Material: Board_Report_Motion_PCCHS_Attendance_Policy.pdf
2022-2023 PCCHS Attendance Policy_Revised.pdf

EXECUTIVE DIRECTOR/PRINCIPAL

MOTION COVER SHEET

PCHS Attendance Policy - Revised

August 23, 2022

TOPIC/ AGENDA ITEM:

VI. Academic Achievement
A. PCHS Attendance Policy

PERSONNEL INVOLVED:

Executive Director/Principal and Director/Assistant Principal of Admissions and Attendance

ISSUES INVOLVED/FISCAL IMPLICATIONS (IF ANY):

The PCHS Attendance Policy was suspended during COVID-19 eLearning and the 2021-22 school year. Since returning to campus, there has been a decline in daily attendance. Lower participation rates can impact school funding. In addition, the impact of missed instructional time is detrimental to the academic success of many students.

EXECUTIVE DIRECTOR/PRINCIPAL'S RECOMMENDATION:

The Executive Director/Principal recommends the approval of the revised PCHS Attendance Policy.

RECOMMENDED MOTION:

“To approve the revised PCHS Attendance Policy as presented on August 23, 2022.”



Pamela Magee
Executive Director/Principal



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2022-2023 PCHS ATTENDANCE POLICY

Effective Fall 2022 SY

Going to school every day is required and enforced by law. Parents/guardians are responsible for ensuring that their children regularly attend school and arrive on time. Families and PCHS personnel can act as partners to teach students the importance of attendance so young adults are prepared for the future. Attendance demonstrates responsibility and dedication to future employers and plays a key factor in the hiring and promotion of employees.

Compulsory Education

California Education Code (EC) Section 48320

Each person who is between the ages of six and eighteen years and not otherwise exempted is subject to compulsory full-time education by the State of California. Students who are at least sixteen years of age are allowed to attend school part-time through a continuation or other alternative education programs. Parents/Guardians are required by law to send their children to school.

Parents, Guardians, and Families Influence Attendance - Get Involved!

- Plan family events and vacations for non-school days only. Schedule non-emergency medical and dental appointments during after-school hours.
- Ensure PCHS has accurate daytime contact information, including mobile and work phone numbers and/or email addresses.
- Encourage students to actively communicate with their teachers when they miss school or know that they will be absent.
- Routinely check attendance using the PCHS online information system, Infinite Campus.
- Alert the Attendance Office and child's counselor of any issues that may be causing absences

Attendance Requirement

Our Attendance Policy is designed to make students aware of the relationship between achievement and good attendance. This policy recognizes the fact that consistent in-class instruction is essential in assuring student success. When students attend school, they have the opportunity to fully participate in instructional activities, are more likely to go to college, and enjoy the rich variety of academic opportunities PCHS offers.



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All students are expected to maintain "satisfactory attendance". Satisfactory attendance during the school year is considered (EC 48260):

1. Having fewer than seven (7) unexcused tardies for any one class,
2. Fewer than 3 unverified absences in any one class,
3. No truancies.

Without "satisfactory attendance", students may not pass a course(s) due to lack of participation, assignment submissions, low test scores, etc.

A major responsibility for attendance lies with the student and his or her parent/guardian. Therefore, parents/guardians must keep track of their students' attendance to school using the Student Information System (Infinite Campus). Parents/Guardians are responsible to verify all absences with three (3) days upon their child's return from school. It is imperative that students make arrangements with teachers prior to any planned absences from class to the best of their ability.

Attendance Interventions

PCHS uses a tiered system of response to promote good attendance and support students with chronic absenteeism. Some key components of PCHS intervention strategies include:

- PCHS staff shall counsel any student who has excessive absences or tardies.
- Teachers shall notify the Attendance Office if they see a developing attendance pattern or problem.
- Parents/Guardians shall monitor daily attendance and progress report grades through their Infinite Campus parent portal computer access.
- Counseling or Health Office conferences shall occur upon identified chronic absenteeism.
- A parent conference shall be required if the school determines that there is a developing pattern of attendance problems. The student and parents/guardians shall sign an attendance contract at the close of this meeting.
- Coordinated School Response (SST, COST) shall be conducted to decide mitigation for continued chronic absenteeism, which could result in Saturday School attendance or a different educational setting.

TIERED SYSTEM OF ATTENDANCE SUPPORT

TIER ONE-UNIVERSAL	TIER TWO- EARLY INTERVENTION (Chronic Absenteeism)	TIER THREE- INTENSIVE INTERVENTION
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<ul style="list-style-type: none"> • Engaging school culture • Attendance data monitors by PCHS and parents/ guardians • High expectations • Recognize and reward good/improved attendance • Earned school privileges • Automated calls to parents/guardians to notify them of student absences • Consistent teacher and PCHS communication to students and families regarding attendance 	<ul style="list-style-type: none"> • Personalized outreach and support (Student Success Team/SST) • Individual parent/guardian support, outreach, and conference • Saturday School • Socioemotional and academic support and resources • Attendance contracts • Loss of privileges 	<ul style="list-style-type: none"> • Coordinated school response • Legal Intervention
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Attendance Related School Privileges

Students without "Satisfactory Attendance" may be denied the following privileges:

- GRADUATION CEREMONY
- ATHLETIC COMPETITIONS
- SCHOOL PERFORMANCES
- EXTRA-CURRICULAR EVENTS
- OFF-CAMPUS LUNCH PASS
- CLUB ACTIVITIES
- LEADERSHIP POSITIONS
- PROM, GRAD NITE & SENIOR EVENTS
- HOMECOMING & SCHOOL WIDE EVENTS
- COLLEGE VISITS
- WORK PERMITS

Additionally, if students do not verify an absence with a parent/guardian note to the Attendance Office within three (3) days of returning to campus, they may not be able to make up any missed work.



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Senior Warning: Seniors with 14 or more UNEXCUSED absences (see Infinite Campus-Absence Codes & Explanations) in one class during the year (or 7 or more per semester) may risk the opportunity of participating in the Graduation Ceremony.

ABSENCE-BASED INELIGIBILITY

Students with three (3) or more unexcused absences from any one course during a grading period may be subject to ineligibility in participating in extracurricular activities including team sports/events, VAPA, and extracurricular field trips, as well as miss out on earned-school privileges. (See example of a 2022-2023 grading period dates below.)

2022-2023 Grading Period Dates

	Fall Semester 2022	Spring Semester 2023
Progress 1	August 17 - September 29, 2022	January 10 - March 2, 2023
Progress 2	September 30 - November 10, 2022	March 3, - April 13, 2023
Final Grading	November 14 - December 16, 2022	April 14 - June 8, 2023

Attendance Definitions

- **"Tardy"**: [SCHOOL ABBREVIATION] starts at [INSERT TIME]. Students shall be classified as tardy if the student arrives after that time.
- **"Unexcused Absence"**: A student shall have an unexcused absence if the student is absent or is tardy for more than thirty (30) minutes without a valid excuse.
- **"Truant"**: A student shall be classified as a truant if the student is absent from school without a valid excuse three (3) full days in one school year, or if the student is tardy or absent for more than any 30-minute period during the school day without a valid excuse on three (3) occasions in one school year, or any combination thereof. Any student who has once been reported as a truant and who is again absent from school without valid excuse one or more days, or tardy on one or more days, shall again be deemed a truant. Such students shall be reported to the Executive Director or designee.
- **"Habitual Truant"**: A student shall be classified as a habitual truant if the student is reported for truancy three (3) or more times within the same school year. This generally occurs when the student is absent from school without a valid excuse for five (5) full days in one school year or if the student is tardy or absent for more than any 30-minute period during the



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school day without a valid excuse on five (5) occasions in one school year, or any combination thereof.

- "Chronic Truant": A student shall be classified as a chronic truant if the student is absent from school without a valid excuse for ten (10) percent or more of the school days in one school year, from the date of enrollment to the current dated.
- "Student Success Team": This team is comprised of an administrator, counselor, Attendance Office personnel, faculty, and staff. Together with the parent/guardian and student, the team will assess and create a plan to improve attendance as well as provide any other needed support.
- "Coordination of Services Team": This team is comprised of counselors, the Mental Health Team, and Attendance Office personnel. They meet twice a month to review students' needs, including attendance cases. Together, they create outreach opportunities and design specific support plans.

Verifying Absences

Attendance is reported each class period to the Attendance Office.

Parents/guardians will be notified of absences by automated phone messages and/or computer-generated letters. Parents/guardians are also encouraged to check Infinite Campus (Parent Portal) on a regular basis for up-to-the-minute attendance reports. In the event of an absence, students must verify the absence with the Attendance Office. Students may visit the Attendance Office before school, during nutrition/lunch and/or after school.

To verify the absence see "Re-Admittance from an Absence."

Absence notes must be signed by a parent/guardian. The school must be notified each day of an extended absence. (A written note does not automatically mean an excused absence.)

PCHS no longer uses the term "clearing absences". The term "clearing" absences gave an impression to families that they are erased from their students' records. This is not true. To verify an absence means that the family has provided documentation regarding the whereabouts of the students' absence.

An acceptable absence note is a written statement of the date(s) and reason(s) for an absence or tardy. This note must be signed by the student's parent/guardian, or by the student if the individual is eighteen (18) or older and has submitted proper documentation for parental approval to sign notes. In order to be added to the PCHS 18+ Student Attendance Responsibility list, please submit the required documentation. Returned documents must be notarized. The forms are available in the Attendance Office.



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A student returning to school after an absence must bring documentation to the Attendance Office (or submit via the [PCHS Online Attendance Verification Form](#)) specifying the date(s) of an absence and the reason for the absence. The note must be signed by a parent/guardian for re-admittance to school, otherwise, the absence(s) shall be deemed unexcused. If a student is 18 or older, and has prior approval from a parent/guardian and submitting a PCHS 18+ Student Attendance Responsibility Form, that student may sign the note. The note should be submitted to the Attendance Office staff to verify before the student goes to class. Students that without a verification note, will be **considered truant if no note is provided after three days upon return to school.**

Students who forge notes will be considered truant and will be referred to the Dean's Office.

PCHS Online Attendance Verification Form

Parents/Guardians may request an early check-out or report an absence using our Online Attendance Verification Form here: [PCHS Online Attendance Verification Form](#).

- After the Online Attendance Verification Form is filled out and submitted to PCHS, the Attendance Office may contact parents/guardians to confirm and then create an early check-out pass for students to pick up at the Attendance Office.
- The student must report to the Attendance Office during any passing period BEFORE the start of the class that they are checking out from to pick up an early check-out pass.
- The student cannot leave a classroom at check-out time without this check-out pass.
- Upon entering the classroom, any student with an early check-out pass must show it to the teacher. When it is time to leave the class, students can quietly collect their belongings and leave the classroom. The check-out pass must be shown to security in order to leave the premises.
- If a student was inaccurately marked absent for a class, parent/guardian should contact the teacher directly. The teacher will contact the Attendance Office should a change in attendance be necessary.
- Early check-out after school-wide testing is not recommended as this could affect a student's attendance.
- Parents/Guardians are not permitted to contact students during class time to get them out of class via cellphone or a text!

IMPORTANT NOTE: The Attendance Verification Form is only valid if submitted using a parent/guardian email recognized by the Student Information System (SIS) - Infinite Campus.



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Re-Admittance from an Absence

Students should report directly to the Attendance Office to verify all absences BEFORE returning to any classes. Students should bring an absence note signed by a parent/guardian that includes the student's name, birth date, date/s of absences and reasons for absence, and a phone number where a parent/guardian can be reached during the day.

Students who are 18 years old may sign their own absence notes if parents/guardians permit, subject to verification of age and the prior submission and approval of a NOTARIZED 18+ Student Attendance Verification Form.

Excused Absences for Classroom Based Attendance

With the written consent of their parent(s)/guardian(s), students may be excused from school in order to participate in religious exercises or to receive moral or religious instruction. *No students shall have their grade reduced or lose academic credit for any excused absence or absences if missed assignments and tests that can reasonably be provided are satisfactorily completed within a reasonable period of time. One day shall be granted to make up missed assignments, assessments, and classwork for every day of an excused absence.*

Notwithstanding Section 48200, a student shall be excused from school when the absence is:

1. Due to the student's illness, including an absence for the benefit of the pupil's mental or behavioral health. (EC 48205)
2. Due to quarantine under the direction of a county or city health officer.
3. For the purpose of having medical, dental, optometry, or chiropractic services rendered.
 - Students in grades 7-12, inclusive, may be excused from school for the purpose of obtaining confidential medical services without the consent of the student's parent/guardian.
4. For the purpose of attending the funeral services of a member of the student's immediate family, so long as the absence is not more than one day if the service is conducted in California and not more than three days if the service is conducted outside California.
 - Excused absence in this instance shall be limited to one (1) day if the service is conducted in California or three (3) days if the service is conducted out of state.
 - "Immediate family" shall be defined as parent/guardian, grandparent, spouse, son/son-in-law, daughter/daughter-in-law, brother, sister or any other relative living in the student's household.



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5. For the purpose of jury duty in the manner provided for by law.
6. Due to the illness or medical appointment during school hours of a child of whom the student is the custodial parent, including absences to care for a sick child for which the school shall not require a note from a doctor.
7. For the purpose of serving as a member of a precinct board for an election pursuant to Section 12302 of the Elections Code.
8. For the purpose of spending time with a member of the student's immediate family who is an active duty member of the uniformed services, as defined in Section 49701, and has been called to duty for, is on leave from, or has immediately returned from, deployment to a combat zone or combat support position. Absences granted pursuant to this paragraph shall be granted for a period of time to be determined at the discretion of the superintendent of the school district.
9. For the purpose of attending the student's naturalization ceremony to become a United States citizen.
10. For the purpose of participating in a cultural ceremony or event.
11. Authorized parental leave for a pregnant or parenting student for up to eight (8) weeks, which may be extended if deemed medically necessary by the student's physician.
12. Authorized at the discretion of the Executive Director or designee, based on the facts of the student's circumstances, are deemed to constitute a valid excuse.
13. A student who holds a work permit to work for a period of not more than five (5) consecutive days in the entertainment or allied industries shall be excused from school during the period that the student is working in the entertainment or allied industry for a maximum of up to five (5) absences per school year subject to the requirements of Education Code section 48225.5.
14. In order to participate with a not-for-profit performing arts organization in a performance for a public-school student audience for a maximum of up to five (5) days per school year provided the student's parent/guardian provides a written note to the school authorities explaining the reason for the student's absence.
15. For the following justifiable personal reasons for a maximum of five (5) school days per school year, upon advance written request by the student's parent/guardian and approval by the Executive Director or designee pursuant to uniform standards:



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- Appearance in court.
- Observance of a holiday or ceremony of the pupil's religion.
- Attendance at religious retreats (shall not exceed four hours per semester)
- Attendance at an employment conference.
- Attendance at an educational conference on the legislative or judicial process offered by a nonprofit organization.

Absences due to Illnesses

After the fifth (5th) day of illness/health related absence per parent/guardian note (IC Code #1P), even if non-consecutive, the student must bring in a doctor's note or documentation from PCHS Health Office or Student Support Services excusing illness/health related absences.

It shall be at the discretion of the individual teachers to allow or not allow students who miss school work due to **unexcused** absences the opportunity to make up missed work.

Unexcused Absences An absence will be deemed unexcused if the student does not submit an absence note to the attendance office upon return to school.

Absences for the reasons listed below are unexcused:

1. Personal reasons not classified as excused by California Education Code and PCHS Board Policy.
2. College visits without prior administrator approval.
3. Vacation
4. Preparation for an personal event.
5. Babysitting/Caretaking
6. Repairing car or household items. Waiting for service or repair people.
7. Attending a sporting event other than a school-sponsored event in which the student is a participant without prior principal approval.
8. Other reasons not included in Education Code sections 46010 and 42805.

Teachers do NOT have to give a student make-up work for an UNEXCUSED absence.

Tardiness

A. Tardy

Students will be considered tardy if they are not in their seat, ready to work when the tardy bell rings. **Excused tardies are at the discretion of PCHS.** Tardies may be excused by school personnel only. To be considered an excused medical tardy, a verified medical note is required.



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A student who arrives in a class without a stamped or signed school pass will be considered tardy unexcused.

Three (3) unexcused tardies will equal one (1) absence. With the third tardy in any class, a student may be assigned lunch detention. Subsequent tardies will result in further detentions and/or a 4-hour study period on a prearranged Saturday morning.

A tardy without a signed or stamped school pass of more than 30 minutes to a class will be considered an absence from that class.

Examples of unexcused tardies

- Alarm did not ring/slept late.
- Car problems/flat tires/no gas.
- Three (3) unexcused tardies are considered one (1) unexcused absence.
- Three (3) unexcused tardies of thirty minutes or more are considered a truancy.

B. Tardy Sweeps

Students are to arrive to class on time each and every period. Tardy sweeps are designed to identify students who are chronically tardy to class/school and to encourage promptness. The consequence for students caught in tardy sweeps is a lunch detention, which could lead to Saturday Detention. Tardy sweeps are conducted regularly during random periods. Students tardy during a tardy sweep will automatically be issued detention. Students and families should monitor their attendance on Infinite Campus and check with the Attendance Office if there are any questions.

A student may obtain a signed or stamped pass from school personnel (teachers, administrators, office staff, etc.) if the student is detained for school-related business only. The pass should indicate the date, time of departure, and location of the departure and destination points.

Attendance Reporting (Daily/Semester)

The computerized attendance and grade system (Infinite Campus) records attendance each period. Each class counts in determining a student's official attendance each day. Parents/guardians are encouraged to check on their student's attendance. Please use the following link:

<https://palisades.infinitecampus.org/campus/portal/palisades.jsp>

In Infinite Campus, an "A" stands for absent and a "T" stands for tardy. A list of computer codes for attendance can be found on the following page.

1. Teachers will emphasize the importance of maintaining good attendance for achieving academic success.



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2. Teachers will also notify parents/guardians via progress reports and/or other written correspondence, or by telephone, that students have excessive absences in their class. Absences and tardies for each class will automatically be reported for all students on all progress reports and report cards.

Absence and Tardy Codes

Infinite Campus Attendance Code Colors	
Excused Absence or Tardy	GREEN
Unexcused Absence or Tardy	RED
Unknown Absence or Tardy	YELLOW

Infinite Campus - Absence Codes & Explanations				
CODE	DESCRIPTION	VERIFIED or UNVERIFIED by PARENT/GUARDIAN	EXCUSED or UNEXCUSED per ED CODE	COUNTS as an ABSENCE
A (Marked by Teacher)	Absence Not Yet Verified <i>Used by teachers to indicate a student was absent, reason TBD.</i>	Unverified	Unexcused	YES
AS	Absence Recovery during Saturday School	--	--	--
8	Unexcused Tardy 30 Minutes or fewer <i>Students must check in with the Attendance Office and are then sent to class. Student does not present a valid excuse. Tardy counts towards truancy accumulation.</i>	Unverified or Verified	Unexcused	3 = Absence YES



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CV	College Visit <i>College/University Visit Form must be completed and documentation provided upon return. Up to six days per school year will be excused. Days absent count in accumulation.</i>	Verified	Max 6 Excused	YES
FT	Field Trip	Verified	Excused	NO
1P 1M 1N	Illness or Medical Appointment <i>If an appointment is during the school day, the Permit to Leave School Grounds slip needs to be signed and returned to the Attendance Office.</i>	Verified	Excused	YES
7	Excused Tardy <i>When a student is tardy for reason identified in EC 48205(a), for any length of time, the student must take note to the Attendance Office.</i>	Verified	Excused	NO
4I	In-school Suspension <i>Assigned for disciplinary reasons, parents/guardians are notified. The student is responsible for completing make-up work.</i>	Verified	Excused	NO
3	Non-Compliant <i>Truant (arrived more than 30 minutes late without a valid excuse</i>	Unverified	Unexcused	YES
4	Suspension <i>Assigned for disciplinary reasons, parents/guardians are notified. Makeup work will be provided at the discretion of the teacher.</i>	Verified	Unexcused (Not in Truancy Count)	YES



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T (Marked by Teacher)	Tardy LESS than 30 Minutes Not Yet Verified Used by teachers to indicate a student was tardy. The student reports directly to class. Students take parent/guardian verified notes to the Attendance Office during nutrition, lunch, or before/after school.	Unverified	Unexcused	3 = Absence YES
2	Parent/Guardian Explanation for absence is NOT included in EC 48205 Eg. include, but are not limited to: sleeping in, family vacation, student ditching, student seen on campus.	Verified	Unexcused	YES
EC TP	School Activity Such as AP test, sports release, ASB assembly prep, etc.	Verified	Excused	NO
5	Administrator Approval for Personal Reasons Must be requested in writing in advance. Based on 48260(c), "discretion of school administrators & facts of pupil's circumstances" such as court appearance, funeral, religious holiday or ceremony	Verified	Excused	YES
1P	Excused Absence All reasons identified in EC 48205(a) (except illness, medical, admin approval or college visit)	Verified	Excused	YES
8	Unexcused Tardy LESS than 30 Minutes Students report directly to the Attendance Office to receive a pass permit.	Verified	Unexcused	3 = Absence YES
Z	State Emergency Only used at the direction of an administrator with state authorization.	Verified	Excused	NO



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Family Move

If students have a change of address but plan to continue enrollment at PCHS, they need to report the new address and phone number (if applicable) to the Attendance Office as soon as possible. A change of address form should be submitted along with a current utility bill. If the move occurs during summer break and the student needs to change schools, the Attendance and Counseling Offices will be open to assist families to gather the necessary papers to enroll the student in the new school.

Changes in Family Information

Parents/Guardians will submit new addresses, phone numbers, and email addresses to the Attendance Office as soon as possible by contacting the Attendance Office at attendanceoffice@palihigh.org.

Early Check-Out

If a student needs to leave school early, the student should bring a physical note to the Attendance Office before school or by nutrition. Parents/Guardians may also submit an early check-out by using the [PCHS Online Attendance Verification Form](#) (located on the Attendance website) before the start time of nutrition by using their listed email address to excuse an absence, complete an early check-out, or late arrival. The physical note should include the student's name, grade, birth date, the current date, a phone number where a parent/guardian can be reached, the time the student must leave, the reason for leaving early, and the parent's/guardian's signature. There are times when parents/guardians may call the Attendance Office (310) 230-6629, to accept the information over the phone. There may be circumstances where a school administrator decides that parents/guardians need to check out their students in person.

Parents/Guardians must have proper state- or school-issued ID on hand to show to the attendance office. If a student leaves campus without checking out through the Attendance Office, it will be considered a class cut. Detention will be assigned for each period missed. PCHS must know the location of students during the school day. Parents/guardians can help by requiring children to follow these procedures.

Students who check out due to illness or injury must go through our clinic to be excused. Documentation from a medical professional must be attached to [PCHS Online Attendance Verification Form](#) if the parent/guardian chooses to submit absence verification through the online process.

IMPORTANT NOTE: EARLY CHECK-OUT WILL NOT BE GRANTED AFTER STATE TESTING, ADVANCED PLACEMENT (AP) TESTING, OR SEMESTER FINALS. IN AN EMERGENCY SITUATION, PARENTS/GUARDIANS OR THE EMERGENCY CONTACT LISTED ON INFINITE CAMPUS MAY PICK THEIR STUDENT UP IN PERSON. STUDENTS WILL NOT BE ABLE TO LEAVE WITH UNDESIGNATED PEOPLE NOT INCLUDED ON THEIR INFINITE CAMPUS ACCOUNT.



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Leaving Campus

Students needing to leave campus for a pre-arranged appointment must notify the Attendance Office upon arriving to school to receive an "Off-Campus Pass". Leaving school without permission from the Nurse's Office and/or Attendance Office will warrant a TRUANCY with disciplinary action. Students must be readmitted in the Attendance Office when returning to campus (the same day or when returning the next school day) with the proper note/documentation. Parents/Guardians are to pick students up at the security gates.

If a student becomes ill during the school day, they should obtain a pass to the Nurse's Office from the teacher or school official. A student should not call a parent/guardian first and ask to be picked up anywhere on campus other than the Attendance Office. If the student is too ill to remain at school, the nurse will call and inform a parent/guardian so that arrangements may be made for the student to go home. The nurse will issue a "Health Office Excuse."

Students who leave campus without a pass from the Attendance Office or Nurse's Office will be considered truant. Telephone calls or notes to the Attendance Office after the student leaves campus without permission cannot verify the truancy. This also applies to students who have a zero or seventh period.

IMPORTANT

- The Attendance Office will not accept calls or notes to excuse mid-day absences after a student has already left campus without an Off-Campus Pass.
- Communication will be made to parents/guardians if their student (regardless of age or grade level) leaves campus early or is absent from class.

Early check-out after school-wide testing is not recommended as this could affect a student's attendance.

Parents/Guardians are NOT permitted to call students during class time.

Senior Off-Campus Lunch Privileges Guidelines

Palisades Charter High School is a closed campus. It is necessary to have parental permission for a senior student to have the privilege to leave campus during lunch. The policy only governs off-campus privileges during the lunch period. No off-campus privileges are granted for Nutrition. Only 12th-grade students may apply. Students must apply and be approved for an off-campus lunch pass. There is a \$5.00 fee for a Senior Lunch Off-Campus ID.

The authorization and decision for a student to operate a motor vehicle during the lunch period rests entirely with the parent/guardian of the student. PCHS, its administration, officials, or employees are not liable for any claims, actions, loss, or damage that may arise as a result of a student either operating or being a passenger in a motor vehicle during the lunch period. The student and parent/guardian are responsible for acquiring and maintaining a valid California



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driver's license and minimum liability insurance required by state law for the driving student.

Students exercising off-campus lunch privileges are subjected to the same rules of student conduct applicable during the whole school day, (en loco parenti). The abuse of any of these provisions may result in a suspended or terminated off-campus lunch permit and/or other disciplinary consequences.

Pending: Adoption by the PCHS Board of Trustees on August 23, 2022

Coversheet

Independent Study and Independent Study Agreement

Section: V. Academic Excellence
Item: C. Independent Study and Independent Study Agreement
Purpose: Vote
Submitted by:

Related Material:

Master AgreementFinal 2022-2023 (4859-7077-2010.v1).pdf

PCHS_Independent_Study_Board_Policy (AB181 Budget Trailer Bill) (4886-2864-9514.v1).pdf



PALISADES CHARTER HIGH SCHOOL VIRTUAL ACADEMY INDEPENDENT STUDY CONTRACT 2022-2023

Student Name:

Contract Duration: 2022-2023

Parent Name:

Beginning Date:

Grade Level:

End Date:

Parent Email:

Student PCHS Email:

All virtual classes follow the same semester timeline as the traditional school year with assignments due on a weekly basis and a specific criteria set that must be met in order for the student to receive credit. Because of the independent nature of this course, it is important that the teacher, parents/guardians, and student agree to commit the time, energy, and responsibilities needed to complete it successfully.

Program Information:

Academic Delivery: The Virtual Academy content is delivered through online material that students read or listen to independently. According to AB 130 and AB 167, teachers of record will provide a required weekly seminar opportunity on zoom although students who are able, may attend in-person. This seminar is not required but encouraged. Virtual Academy Teachers will also be available during their Virtual Academy period for student in-person drop ins. Zoom meetings, except for the seminar, will be available by appointment only during the teacher's Virtual Academy period.

The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress:

- a. **Manner of Reporting:** Virtual
- b. **Time:** During school hours between [INSERT] and [INSERT]
- c. **Frequency:** Every 5 school days.
- d. **Place:** At the schoolsite or online via virtual live connection.

Parent Support: Families should contact Virtual Academy supervising teacher, coordinator, and the counselor if their child is having difficulty (academically or emotionally) in a subject area or in the program itself.

Ethics Policy: Students are expected to complete their own work at all times. If a student breaks this code, then the PCHS Ethics Policy will be enforced and may result in the student being removed from the course. Cyber bullying will not be tolerated. Students engaged in cyber bullying will meet with the academic dean to determine program continuation.

Communication: Students are required to check both their email, Remind communication, and Schoology on a daily basis for messages or updates from the instructor and/or coordinator unless at a Educational Site, which is handling this.

Method of Study: Specific methods of study will be explained on each of the student's courses on Schoology. Examples of methods of study for the student will include but are not limited to: State Testing, Independent Reading, Problem Solving, Study Projects, Drill & Practice, Computerized Curriculum, Synchronous instruction, Web/Internet Research, Library Research, Tests all within the assigned curricular programs being used each year. All work will be available through the curricular program and accessible for independent learning.

Method of Evaluation: All exams are required to be taken with Virtual Academy instructors unless in a specific program where the tests will be proctored at that site or through the IEP case carrier and approved by PCHS. Academic evaluation dates will be designated on the Student Pacing Sheet/Schoology. Evaluations will be available through and aligned with the Virtual Academy curricular program.

Grades: Grades will be entered on the school's Infinite Campus/Schoology portal. This system is accessible to all students and their families. Students and families are responsible for keeping track of grades earned, work completed, and work missing.

Resources: The school will provide appropriate instructional materials (texts) and personnel (tutoring centers and teachers) to assist the student in completing the assigned work. Assignments and specific resources will be designated on the Assignment Sheet/Pacing Plan on Schoology. Use of the school tutorial Study Center, Library, and Math Lab is highly encouraged. Resources must include those reasonably necessary to the achievement of the objectives and must include resources that are normally available to all students on the same terms as the terms on which they are available to all. The school will confirm or provide access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

Meeting Requirements: Students are expected to meet with each teacher during the teacher's academic seminar meeting on Zoom or in-person. Module exams are proctored by a Virtual Academy teacher in a V.A. classroom/zoom. Under AB 130 and AB 167, teachers will provide a weekly academic seminar opportunity. Students are not required to attend the seminar; however, Virtual Academy coordinator, with the assistance of supervising teacher, encourage students to attend and will begin a tiered re-engagement for students not attending seminars. To receive credit for science courses, students are required to attend science labs. **Missing over two science labs will result in a Fail.**

Board Policy Requirements:

1. For pupils in all grade levels and all programs offered by the School, the maximum length of time that may elapse between the time an independent study assignment is made and the date by which the pupil must complete the assigned work shall be five (5) school days.
2. The Executive Director/Principal or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
 - a. The Executive Director/Principal or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:

- i. When any pupil fails to complete four (4) assignments in any course in which the pupil is enrolled.
- ii. In the event pupil's educational progress falls below satisfactory levels which is indicated by failing to earn a passing grade in any course in which the pupil is enrolled and/or as determined by the assigned supervising teacher which considers ALL of the following indicators:
 1. The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
 2. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
 3. Learning required concepts, as determined by the supervising teacher.
 4. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. This record shall be maintained for a period of three years from the date of the evaluation and if the pupil transfers to another California public school, the record shall be forwarded to that school. A missed appointment shall be considered a "missed assignment" for purposes of the Board Policy.

Attendance: Attendance in independent study is based on 1) the daily engagement of the Student on instructional activities required by PCHS on school days (M-F, non-holidays); and 2) the time value of the student's work product as determined by the credentialed supervising teacher. As a result, to receive full attendance, students must engage in an some instructional activity required by PCHS on each school day and the amount of work produced each week must be judged by the supervising credentialed teacher to be of equal value to the days of work assigned.

Objectives: The student will complete the courses registered on Infinite Campus/Schoology. All course objectives will be consistent with the established charter school's board policy above and are consistent with state standards The pupil shall engage in content provided by the Charter School which is aligned to grade level standards that is substantially equivalent to in-person instruction. As a high schools, this shall include access to all courses offered by the local educational agency for graduation and approved by the University of California or the California State University as creditable under the A–G admissions criteria.. The Assignment Sheet on Schoology will include descriptions of the major objectives and grading policy covered by this agreement and PCHS procedures and policies including the evaluation of student work..

Statement of Academic and Other Supports for Special Populations: The Charter School shall utilize its intervention and re-engagement procedures to address the needs of pupils who are not performing at grade level, or who need support in other areas, such as English Learners, pupils in foster care or pupils who are experiencing homelessness, and/or pupils requiring mental health support. The Charter School complies with the Individuals with Disabilities in Education Act ("IDEA") and is committed to meeting the needs of individuals with exceptional needs in order to be consistent with the pupil's individualized education program ("IEP"). Policies, procedures, and guidelines are in place to ensure that pupils are identified, assessed, and provided a free appropriate public education in the least restrictive environment. The Charter School complies with Section 504 of the federal Rehabilitation act of 1973 (29 U.S.C. Sec. 794) and is committed to providing

equivalent access to and providing a free appropriate public education to all students with disabilities.

Statement of the Measures of Academic Achievement to be Earned by the Pupil Upon

Completion: Students, grades 9-12, shall obtain academic credits towards Charter School graduation requirements as follows.

To be completed by coordinator: Courses and Credits to be Earned Upon Completion of the Semester/Year

Course Name	Credit

Voluntary Statement: It is understood that independent study through the Virtual Academy is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class or program pursuant to Education Code Section 48915 or 48917, instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.

Pupil-Parent-Educator Conference: Before signing this written agreement, the parent or guardian of a pupil may request that the Charter School conduct a telephone, videoconference, or in-person pupil-parent-educator conference or other school meeting during which the pupil, parent or guardian, and, if requested by the pupil or parent, an education advocate, may ask questions about the educational options, including which curriculum offerings and nonacademic supports will be available to the pupil in independent study, before making the decision about enrollment or disenrollment in the various options for learning.

By completing the information below all Parties signing below, agree to be bound by the terms of this Contract and the Virtual Academy Student Rules and Responsibilities incorporated herein. This Contract is for students attending the Virtual Academy during the 2022-2023 school year.

By signing my name below and submitting this form to the Virtual Academy, I affirm that I have read the PCHS Virtual Academy Contract on the above pages and agree to its terms¹.

Title	Signature	Date
Pupil		

¹ Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the California Department of Education that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.

Title	Signature	Date
Parent/Guardian/Caregiver (if pupil is under the age of 18)		
Certificated employee who has been designated as having responsibility for the general supervision of independent study		
Certificated employee designated as having responsibility for the special education programming of the pupil, as applicable		



Revision Date:
August 23, 2022

INDEPENDENT STUDY POLICY

Palisades Charter High School (the “Charter School”) may offer independent study to meet the short or long-term educational needs of pupils enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach the knowledge and skills of the core curriculum. The Charter School shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully.

Participation in independent study shall be limited to staffing capacity and shall be maintained to be lower than 20% of the overall attendance of PCHS. Should interest in independent study exceed capacity, participation shall be determined by public random drawing. Priority for independent study shall be provided to those students with written documentation from a physician that student is unable to attend that states that a student cannot safely attend school in-person even with appropriate safety measures as required by the local, state, and federal departments of health.

The following written policies have been adopted by the Palisades Charter High School Board of Directors for implementation at Charter School:

1. For pupils in all grade levels and programs offered by the Charter School, the maximum length of time that may elapse between the time an assignment is made and the date by which the pupil must complete the assigned work shall be five (5) school days.
2. The Executive Director/Principal or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
 - a. When any pupil fails to complete four (4) assignments in any course in which the pupil is enrolled.
 - b. In the event pupil’s educational progress falls below satisfactory levels which is indicated by failing to earn a passing grade in any course in which the pupil is enrolled and/or as determined by the assigned supervising teacher which considers ALL of the following indicators:
 - The pupil’s achievement and engagement in the independent study program, as indicated by the pupil’s performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
 - The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
 - Learning required concepts, as determined by the supervising teacher.
 - Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

Board Policy #:
Adopted/Ratified:
Revision Date:



PALISADES

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3. The Charter School shall provide content aligned to grade level standards that is substantially equivalent to in-person instruction. This shall include access to all courses offered by the Charter School for graduation and approved by the UC or CSU as credible under the A-G admissions criteria.
4. The Charter School has adopted tiered reengagement strategies* for the following pupils:
 - a. All pupils who are not generating attendance for more than 10% of required minimum instructional time over four continuous weeks of the Charter School's approved instructional calendar;
 - b. Pupils found not participatory in synchronous instructional offerings pursuant to Education Code Section 51747.5 for more than 50 percent of the scheduled times of synchronous instruction in a school month as applicable by grade span; or
 - c. Pupils who are in violation of the written agreement pursuant to Education Code Section 51747(g).

These procedures shall include local programs intended to address chronic absenteeism, as applicable, with at least all of the following:

- a. Verification of current contact information for each enrolled pupil;
 - b. Notification to parents or guardians of lack of participation within one school day of the recording of a non-attendance day or lack of participation;
 - c. Outreach from the Charter School to determine pupil needs including connection with health and social services as necessary;
 - d. When the evaluation described above under paragraph 2.b. is triggered to consider whether remaining in independent study is in the best interest of the pupil, a pupil-parent-educator conference shall be required to review a pupil's written agreement and reconsider the independent study program's impact on the pupil's achievement and well-being. This conference shall be a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement.
5. The following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction*:
 - a. For pupils in grades 9-12, inclusive, the plan to provide opportunities for at least weekly synchronous instruction for all pupils throughout the school year by each pupil's teacher or teachers of record shall be as follows: PCHS teachers will offer virtual and/or in-person office hours two days weekly along with a once weekly virtual and/or in-person instructional seminar.
 6. The following plan* shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days: Within five instructional days of receipt of a communication from a family of their desire to transition their pupil to in-person instruction, PCHS will hold a meeting to consider the timing of the pupil's transition to in-person instruction, the impact of any move mid-semester to the pupil's credit and/or progress towards completion of graduation requirements, and the availability and capacity of the in-person classes to which the pupil wishes to enroll.

Board Policy #:
Adopted/Ratified:
Revision Date:



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* The tiered reengagement strategies, plan for synchronous instruction and live interaction, and plan to transition pupils whose families wish to return to in-person instruction shall not apply to pupils who participate in an independent study program for fewer than 15 schooldays in a school year and pupils enrolled in a comprehensive school for classroom-based instruction who, under the care of appropriately licensed professionals, participate in independent study due to necessary medical treatments or inpatient treatment for mental health care or substance abuse. Local educational agencies shall obtain evidence from appropriately licensed professionals of the need for pupils to participate in independent study pursuant to this subdivision. These sections shall not apply to independent study offered due to school closure or material decrease in attendance for 15 school days or less for affected pupils under one or more of the circumstances described in Education Code Sections 41422 and/or 46392, and 46393 for which the Charter School files an affidavit seeking an allowance of attendance due to emergency conditions.

7. A current written agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:
 - a. The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
 - b. The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.
 - c. The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.
 - d. A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in independent study.
 - e. The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.
 - f. A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.
 - g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
 - h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.
 - i. For a pupil participating in an independent study program that is scheduled for more than 14 school days, each written agreement shall be signed, before the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18

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Board Policy #:
 Adopted/Ratified:
 Revision Date:



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years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. Beginning in the 2022–23 school year, for a pupil participating in an independent study program that is scheduled for less than 15 school days, each written agreement shall be signed within 10 school days of the commencement of the first day of the pupil’s enrollment in independent study, by the pupil, the pupil’s parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. For purposes of this paragraph “caregiver” means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.

- Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the California Department of Education, that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.
8. The Charter School shall comply with the Education Code sections 51745 through 51749.3 and the provisions of the Charter Schools Act of 1992 and the State Board of Education regulations adopted thereunder.
 9. The Executive Director/Principal may establish regulations to implement these policies in accordance with the law.

Coversheet

Contract for Football Game Physician

Section: VI. Athletic Update
Item: A. Contract for Football Game Physician
Purpose: Vote
Submitted by:
Related Material: Football Game Physician Contract - Aug 17 2022.pdf

Vendor/Group Liability Agreement
SCOPE OF SERVICES

NOTE: ALL INFORMATION MUST BE TYPED

TO BE PROVIDED TO THE SCHOOL DISTRICT BY THE VENDOR/GROUP PROVIDING SERVICE

Vendor/Group USC CARE MEDICAL GROUP


Date/s of service August 2022 – December 2024

Vendor/Group Qualifications: A brief summary of qualifications and experience. Include previous service provided to Palisades High School or any other public agency.

USC Orthopaedic Surgery has provided high school game coverage for a number of local high school football programs for the last 5 years. We will be providing similar care for Palisades Charter High School.

Provide detailed information on what you will be providing to the District. Include time lines (if applicable). What will be achieved with the agreement? Expectations and outcomes should be clearly defined.

Provide physicians duly licensed in California (“Physicians”) to perform professional orthopaedic services to the District’s high school students at football games. For the avoidance of doubt, the SCOPE of WORK is limited to professional orthopaedic services only .

Vendor/Group Signature 

Printed Name
Alexander
Weber

Date
8/16/202

Site Administrator Printed Name _____

Initials _____

CERTIFICATION BY CONTRACTOR

CRIMINAL RECORDS CHECK AB 1610, 1612 and 2102


To the Governing Board of Palisades High School School District:

I, USC CARE MEDICAL GROUP certify that:
Name of Vendor/Group

1. I have carefully read and understand the Notice to Contractors Regarding Criminal Record Checks (Education Code Section 45125.1) required by the passage of AB 1610, 1612 and 2102.
2. Due to the nature of the work/service I will be performing for the District, my employees may have contact with students of the District.
3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code Section 1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at Los Angeles _____, California on 8/16/2022.
Date



Signature

Alexander Weber
Type or print name

MD
Title

1520 San Pablo Street LA 90033
Address

855-727-7678
Telephone

Signature _____
Superintendent
Chief

Signature  _____

Print Name Brian Banducci

School/Department Palisades Charter HS
Assistant Principal

8/17/2022
Date

Date

Coversheet

2021-2022 Unaudited Actuals

Section: VII. Finance
Item: A. 2021-2022 Unaudited Actuals
Purpose: Vote
Submitted by:
Related Material: 2021-22 Unaudited Actuals - board materials.pdf



PALISADES

CHARTER HIGH SCHOOL

CHIEF BUSINESS OFFICER

COVER SHEET FOR AGENDA ITEMS

August 23, 2022

TOPIC/ AGENDA ITEM:

VII. FINANCE

A. 2021-2022 Unaudited Actuals

PERSONNEL INVOLVED:

Board of Trustees, Executive Director/Principal, Chief Business Officer, Budget & Finance committee

ISSUES INVOLVED/FISCAL IMPLICATIONS (IF ANY):

The purpose of this action is to approve the 2021-2022 Unaudited Actuals.

In accordance with California Education Code (EC 42100), PCHS is required to prepare an annual statement of all receipts and expenditures for the prior-year. The report is then submitted to our chartering authority, County Office of Education, State Superintendent of Public Instruction, and the State Controller's Office. Our audit firm will then use this report as the basis for reviewing, auditing and confirming our 2021-2022 financial statements.

IMPACT ON SCHOOL MISSION, VISION OR GOALS, (IF ANY):

The action requested of the Board today will support the goal of ensuring fiscal compliance for PCHS.

OPTIONS OR SOLUTIONS:

The expectation is that the board approve the 2021-2022 Unaudited Actuals Report.

CHIEF BUSINESS OFFICER'S RECOMMENDATION:

The Chief Business Officer recommends that the Board approve the 2021-2022 Unaudited Actuals Report.

RECOMMENDED MOTION:

“To approve the 2021-2022 Unaudited Actuals.”

Juan Pablo Herrera
Chief Business Officer

2021-2022 UNAUDITED ACTUALS

AUGUST 23, 2022

PCHS closed the year with a \$2.02 Million ending balance

Of the \$2.02 Million ending balance, \$1.534 Million of it was restricted funds (grants, one-time funds, etc.) that we had to account for in in the 2021-22 year.

- Educator Effectiveness Funds: \$397,553
- A-G Completion Grant (Access/Success): \$421,507
- A-G Completion Grant (Learning Loss): \$62,636
- Ethnic Studies Block Grant: \$76,392
- Supply Chain Assistance Grant: \$74,219
- Child Nutrition: Kitchen Infrastructure Grant: \$27,000
- Expanded Learning Opportunities Grant: \$475,182

These funds will all be spent in 2022-23 and beyond, yet we were required to account for the revenue in 2021-22. Excluding the one-time restricted funds, PCHS' ending balance would have been \$485,647.

2021-2022 Unaudited Actuals

Revenue category	2021-2022 Adopted Budget (6/11/21)	2021-2022 2 nd Interim	2021-2022 Estimated Actuals (5/22/22)	2021-2022 Unaudited Actuals (8/22/22)	Difference (Unaudited vs. Estimated)
LCFF	30,862,422	30,024,548	29,516,359	29,723,412	207,053
Federal	1,683,109	3,804,285	3,482,429	3,370,058	(112,371)
State	3,436,809	3,070,974	2,722,875	2,310,506	(412,368)
Local	3,968,181	3,995,826	3,964,501	4,405,057	440,555
Total	39,950,522	40,895,632	39,686,164	39,809,033	122,869
Expense Category					
Certificated Salaries	16,245,790	16,798,284	15,810,233	15,814,033	3,800
Classified Salaries	5,189,774	5,234,974	4,728,604	4,622,252	(106,351)
Benefits	9,659,937	9,635,883	9,009,636	8,279,062	(730,574)
Books & Supplies	1,380,414	2,173,835	2,037,070	1,172,363	(864,707)
Services, Other Operating Exp.	5,979,164	6,510,580	6,437,385	6,340,078	(97,307)
Depreciation	915,000	980,000	980,000	971,607	(8,393)
Indirect Cost/Debt Service	107,950	470,000	568,930	436,129	(132,801)
Total Expenses	39,690,487	41,645,586	39,309,876	37,788,897	(\$102,521)
Net Total (Revenue – Expense)	260,035	(749,953)	376,288	2,020,136	1,643,848

Key Differences: Unaudited Actuals vs Estimated Actuals

REVENUE

- SpEd Rates increased (IDEA & AB602): \$321,562
- Lottery Rates increased: \$106,192
- Child Nutrition increased: \$88,025
- One-time restricted funds: \$1,534,489

EXPENSES

- Non-Capital Equipment: Decreased by **(\$760,010)** – will invest these funds once an EdTech plan is approved
- STRS/PERS Contribution amount: Decreased by **(\$394,264)** due to attrition, leaves, substitute replacements, etc.
- Transportation: PCHS obligation decreased by **(\$280,382)** because (1) we applied parent contributions/overages (2) relief funds and (3) the scholarship amount came in lower than projected.
- Utilities: Increased by \$126,370

Immediate Next Steps

- Work with independent auditor to complete audit
- Submit to LAUSD & CDE

Palisades Charter High School - 2021-2022 Unaudited Actuals

ADA	2832	2021-2022 Adopted Budget (Full Return), DRAFT as of 5/25/21	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 2nd Interim Projections, 1/31/22	2021-2022	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2021-2022 Unaudited Actuals			Difference	Comments
		Obj Code	Total	Total	Total	Actuals to Date as of 4/30/22	5/22/2022	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	
A. Revenues														
LCFF/Revenue Limit Sources														
												-		\$ 11,641.00
	8011	15,104,903	15,104,903	10,962,726	10,392,620	12,355,682	15,555,226		15,555,226	9,565,088	9,565,088	(2,790,594)	2820 ADA, per governor's guidance of 94% attendance yield	
	8012	6,777,237	6,777,237	8,345,193	6,458,130	8,465,010	8,577,654		8,577,654	11,131,516	11,131,516	2,666,506	2820 ADA, per governor's guidance of 94% attendance yield	
	8019	-	-	-	231,457				-	222,181	222,181	222,181		
	8096	8,980,282	8,980,282	10,716,629	7,478,274	8,695,667	8,695,667		8,695,667	8,804,627	8,804,627	108,960	2820 ADA, per governor's guidance of 94% attendance yield	
Total, LCFF/Revenue Limit Resources		30,862,422	30,862,422	30,024,548	24,560,481	29,516,359	32,828,547	-	32,828,547	29,723,412	-	29,723,412	207,053	
Federal Revenues														
	8181	586,743	777,041	756,994	670,637	751,228		802,782	802,782		833,673	833,673	82,445	\$267.30/ADA PER LAUSD SELPA 6/4/21
	8220	345,000	345,000	360,000	140,892	535,000		475,000	475,000		623,026	623,026	88,026	
		-	-	-	-	-		-	-		-	-	-	
	8290	316,871	316,871	282,238	211,280	282,238		300,583	300,583		270,113	270,113	(12,125)	revised amount per CDE, 12/31/21
	8290	59,607	59,607	56,052	29,116	56,052		59,695	59,695		56,270	56,270	218	
	8290	3,606	3,606	3,861	-	3,861		4,112	4,112		3,128	3,128	(733)	
	8290	3,621	3,621	-	-	-		-	-		-	-	-	
	8290	24,214	24,214	21,761	11,520	21,761		23,175	23,175		22,209	22,209	448	
	8290	35,337	35,337	35,337	15,794	35,337		37,634	37,634		37,861	37,861	2,524	
	8290	10,170	10,170	10,000	3,063	10,000		10,000	10,000		1,562	1,562	(8,438)	
	8220										74,219	74,219	74,219	
	8290		472,831	-	-	472,831		-	-		472,831	472,831	-	LACOE COVID testing award
	8290	-	-	23	23	23		-	-		23	23	-	
	8290	-	-	985,991	266,739	985,065		-	-		867,501	867,501	(117,564)	
	8290	-	-	711,554	221,390	221,390		947,833	947,833		-	-	(221,390)	
	8290	107,643	107,643	107,643	76,404	107,643		-	-		107,643	107,643	-	
Total, Federal Resources		1,492,811	1,683,109	3,804,285	1,646,859	3,482,429	-	2,660,815	2,660,815	-	3,370,058	3,370,058	(112,371)	
Other State Revenues														
	8520	20,000	20,000	35,000	5,092	40,000		36,890	36,890		39,005	39,005	(995)	higher reimbursement due to free meals
	8550	-	139,071	139,084	139,084	139,084	143,764		143,764	139,084	139,084	-	\$50.98/ADA	
	8560	-	436,050	461,616	355,367	458,100	459,660		459,660	516,980	516,980	58,880	higher per ADA rate (\$163.00/ADA)	
	8560	-	142,443	184,080	52,610	182,678		183,300	183,300		229,990	229,990	47,312	higher per ADA rate (\$65.00/ADA)
	8590	164,827	164,827	242,836	242,836	242,836		270,374	270,374		187,163	187,163	(55,673)	
	8590	12,073	12,073	10,000	-	10,000	10,000		10,000		2,400	2,400	(7,600)	
	8590	470,566	470,566	547,287	547,287	547,287		-	-		63,946	63,946	(483,340)	Per CDE 8/19/21- \$915,651 allocation, spent \$368K in 20/21
	8590	2,051,780	2,051,780	1,025,890	119,222	1,025,890		-	-		119,222	119,222	(906,668)	first allocation received in 2021, part of beginning balance
	8590				27,000	27,000		-	-		27,000	27,000	-	
	8590						645,524	645,524		62,636	62,636	62,636		Expanding A-G courses
	8590									421,507	421,507	421,507		
	8590									76,392	76,392	76,392		
	8590			425,181	425,181	50,000		375,181	375,181		425,181	425,181	375,181	Received Dec 2021- revenue to recognize as expenses are spent
Total, State Revenues		2,719,245	3,436,809	3,070,974	1,913,679	2,722,875	613,424	1,511,269	2,124,693	656,064	1,654,442	2,310,506	(412,368)	
Other Local Revenues														
	8311	1,864,023	2,002,632	2,143,258	1,898,747	2,126,933		2,272,897	2,272,897		2,366,050	2,366,050	239,117	\$756.80 PER LAUSD SELPA 10/21
	8634	240,000	240,000	150,000	72,428	80,000		90,000	90,000		82,628	82,628	2,628	lower a la carte sales
	8560	1,046,000	1,046,000	1,046,000	714,170	1,046,000	1,021,000		1,021,000	823,914	823,914	(222,086)		
	8660	129,549	129,549	80,000	43,568	60,000	80,000		80,000	84,856	84,856	24,856		
	8679	100,000	100,000	126,568	126,568	126,568		100,000	100,000		184,290	184,290	57,722	higher receipt from SELPA
	8699	450,000	450,000	450,000	515,364	525,000	450,000		450,000	580,614	580,614	55,614	2022-23 Fundraising revenue will be acknowledged when there is a development budget	
	8980									(3,175,441)	3,458,146	282,705	282,705	
Total, Other Local Revenues		3,829,572	3,968,181	3,995,826	3,370,845	3,964,501	1,551,000	2,462,897	4,013,897	(1,686,057)	6,091,114	4,405,057	440,555	

ADA	2832	2021-2022 Adopted Budget (Full Return), DRAFT as of 5/25/21			2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21			2021-2022 2nd Interim Projections, 1/31/22			2021-2022			2021-2022 Estimated Actuals			2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2021-2022 Unaudited Actuals			Difference	Comments
		Obj Code	Total	Total	Total	Actuals to Date as of 4/30/22	5/22/2022	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted vs. Estimated										
Total Revenues			38,904,050	39,950,522	40,895,632	31,491,865	39,686,164	34,992,971	6,634,982	41,627,952	28,693,419	11,115,614	39,809,033	122,869										
B. Expenditures																								
Certificated Salaries																								
	Teachers' Salaries-Full-Time	1110	13,282,106	13,282,106	13,282,106	10,063,094	13,199,284	11,569,469	1,700,134	13,269,603	11,007,379	2,167,602	13,174,980	(24,304)	22-23 includes 0.25% adjustment to base salary (per union agreement)									
	Teachers Salaries-Librarian	1130	141,176	141,176	141,176	102,676	135,685	139,024		139,024	140,298	-	140,298	4,613										
	Teachers' Salaries-Substitute	1160	238,941	238,941	318,941	403,817	568,735	320,000		320,000	562,895	-	562,895	(5,841)	21-22: reallocated \$80k of ESSER funds from classified salaries to certificated sub salaries. For 22-23, the sub salaries were reduced									
	Cert Pupil Supp Sal-Counselors	1210	817,927	817,927	831,275	689,845	933,528	942,528		942,528	941,232	-	941,232	7,704	Includes additional hours for counseling staff									
	Cert Administrators	1310	918,695	918,695	918,695	754,840	973,000	909,644	143,142	1,052,786	773,617	221,011	994,628	21,628	2022-23 Cert Admin salaries now includes a Certificated HR Director.									
	Other Support/Step& Column Impact	1330	119,633	119,633	119,633			122,624		122,624			-											
	Auxiliaries/Periods/Net	1930	-	-	-					-			-		Approximately \$770k of auxiliaries are included in FT Certificated Salaries									
	FTEs Increase/Decrease		165,000	130,360	130,360				(37,000)	(37,000)			-											
	Impact of Tentative UTLA Agreement		-	-	251,313					-			-		Negotiations currently in process.									
	Certificated Off-Schedule Pay		-	7,000	7,000					-			-											
	ESSER II/III funded certificated time		-	-	97,833					-			-											
	ELO Related Certificated Time	1110	589,952	589,952	699,952					336,000			336,000		Estimated additional PD expense for 2022-23 (ELO)									
Total, Certificated Salaries			16,273,430	16,245,790	16,798,284	12,014,273	15,810,233	13,966,289	2,179,276	16,145,565	13,425,420	2,388,613	15,814,033	3,800										
Classified Salaries																								
	Instruct Aide	2110	944,412	944,412	944,412	602,217	855,410			946,773	946,773	(13,416)	769,747	756,331	(99,079)	2021-22 was lower due to leaves of absence. FTEs are expected to return in 2022-23								
	Maint/Operations	2210	114,902	114,902	114,902	154,544	184,544	144,544		144,544	126,152	16,528	142,680	(41,864)										
	Classified Administrators	2310	416,609	416,609	386,609	303,749	323,036	295,790		295,790	278,802	98,660	377,461	54,425	Shifted HR Director from Classified Admin to Certificated Admin Salaries									
	Cler Tech Office Staff Sal-FT	2410	1,935,059	1,935,059	1,935,059	1,338,822	1,963,500	1,939,897		1,939,897	1,806,227	58,668	1,864,896	(98,604)										
	Food Services	2430	48,397	48,397	48,397	46,602	56,602		52,781	52,781	-	60,568	60,568	3,966	Includes additional hours for summer: free/reduced outreach, orientation & Universal meal implementation									
	Cler Tech Off Staff Sal-Sub	2460	34,817	34,817	34,817	30,319	67,000	75,000		75,000	60,154	-	60,154	(6,846)	Accounts for 2 clerical subs per day (6 hrs) - attendance/absenteeism outreach									
	Other Classified	2920	975,966	975,966	1,015,966	902,032	1,049,021	951,644	100,000	1,051,644	955,995	99,669	1,055,664	6,643										
	Math Paraprofessionals	2920	166,212	166,212	166,212	168,815	229,490	230,063		230,063	94,914	209,584	304,498	75,008										
	Impact Step & Column/Proposed New Positions/Hours		160,000	110,000	110,000				(108,085)	(108,085)			-		Reduction of 4 Paraprofessionals (SpEd aid) due to categorical funds being exhausted in 21-22. Also, 1 Sr. Office Assistant role is not being backfilled.									
	Classified Retro		-	7,000	7,000					-			-											
	Classified Additional Time		-	-	35,204					-			-											
	ELO Related Classified Time	2920	436,400	436,400	436,396					-			-											
Total, Classified Salaries			5,232,774	5,189,774	5,234,974	3,547,101	4,728,604	3,528,853	1,099,554	4,628,407	3,308,828	1,313,424	4,622,252	(106,351)										
Employee Benefits																								
	State Teachers Retirement System (STRS) , Certificated Positions	3111	2,753,464	2,748,788	2,842,270	1,892,101	2,675,091	2,667,561	416,242	3,083,803	2,113,494	396,995	2,510,489	(164,603)	STRS Employer contribution rate increases from 16.92% (2021-22) to 19.1% (2022-23)									
	Public Employees Retirement System (PERS), Classified Positions	3212	1,198,828	1,188,977	1,199,333	643,892	1,083,323	895,270	278,957	1,174,227	646,673	207,039	853,712	(229,611)	PERS employer contribution rate increases from 22.91% (2021-22) to 25.37% (2022-23)									
	OASDI, Certificated Positions	3311	-	-	15,000	17,220	23,220	23,278		23,278	23,917	-	23,917	697										
	OASDI, Classified Positions	3312	324,432	321,766	324,568	215,987	293,173	218,789	68,172	286,961	203,823	77,541	281,364	(11,810)										
	Medicare, Cert Positions	3331	235,965	235,564	243,575	172,933	229,248	202,511	31,600	234,111	193,824	34,573	228,397	(851)										
	Medicare, Class Positions	3332	75,875	75,252	75,907	50,651	68,565	51,168	15,944	67,112	48,215	17,893	66,108	(2,457)										
	Hlth & Wlfr Benefits, Cert	3411	2,538,722	2,538,722	2,538,722	1,948,572	2,361,424	2,280,484	258,238	2,538,722	1,962,577	361,704	2,324,282	(37,142)	Rate increase of 5.9%, also accounted for fewer FTE eligible for benefits									
	Hlth & Wlfr Benefits, Class	3412	1,282,463	1,269,575	1,269,575	956,222	1,156,130	940,575	329,000	1,269,575	830,831	321,053	1,151,884	(4,246)	Rate increase of 5.9%, also accounted for fewer FTE eligible for benefits									
	State Unemploy Insur, Cert Pos	3511	200,163	200,163	83,991	57,755	79,051	69,831	10,896	80,728	71,953	-	71,953	(7,098)	Rate maintains at 0.50% by state of CA (compared to 0.05% in 2019-2020)									
	State Unemploy Insur, Clas Pos	3512	64,363	64,363	26,175	24,752	23,643	17,644	5,498	23,142	31,386	-	31,386	7,743	Rate maintains at 0.50% by state of CA (compared to 0.05% in 2019-2020)									

Palisades Charter High School - Board Meeting - Agenda - Tuesday August 23, 2022 at 5:00 PM
 Palisades Charter High School - 2021-2022 Estimated Actuals as of 5/22/22 and 2022-2023 Adopted Budget as Recommended by B/F 6/6/2022

ADA	2832	2021-2022 Adopted Budget (Full Return), DRAFT as of 5/25/21	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 2nd Interim Projections, 1/31/22	2021-2022	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2021-2022 Unaudited Actuals			Difference	Comments
							Actuals to Date as of 4/30/22	5/22/2022	Unrestricted	Restricted	Total	Unrestricted		
	Obj Code	Total	Total	Total									Unaudited vs. Estimated	
		Other Outgo												
		Indirect Cost (LAUSD)												
	7299	308,624	308,624	300,245	256,540	295,164	328,285		328,285	178,379	116,633	295,012	(152)	
	7699									282,705		282,705	282,705	
		Fund 09 to fund 20 payment												
	7438	11,784	11,784	11,784	10,162	11,784	4,731		4,731	11,784		11,784	0	
		Interest												
		Total, Other Outgo	320,408	320,408	312,029	266,702	306,948	333,016	-	333,016	472,868	116,633	589,501	282,553
		Total Expenditures (Financial Reporting Basis)	39,872,118	39,690,487	41,645,586	29,109,424	39,309,876	32,294,116	8,152,504	40,446,619	28,467,990	9,320,907	37,788,897	
		Total Expenditures (Cash Reporting Basis)	38,978,068	38,883,437	41,135,586	28,572,815	38,898,806	32,004,730	8,152,504	40,157,234	27,694,067	9,559,352	37,253,419	
		C. Ending Balance: Excess (Deficiency) - Financial Reporting Basis	(968,068)	260,035	(749,953)	2,382,441	376,288	2,698,855	(1,517,522)	1,181,333	225,429	1,794,707	2,020,136	
		C. Ending Balance: Excess (Deficiency) - Cash Reporting	(74,018)	1,067,085	(239,953)	2,919,050	787,358	2,988,240	(1,517,522)	1,470,718	999,353	1,556,262	2,555,615	(Revenue - Expenses: Cash Reporting Basis)
		D. Net Increase (Decrease)	(968,068)	260,035	(749,953)	2,382,441	376,288	2,698,855	(1,517,522)	1,181,333	225,429	1,794,707	2,020,136	
		E. Fund Balance												

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Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Object

19 64733 1995836
Form 62

Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
A. REVENUES					
1) LCFF Sources		8010-8099	29,723,412.00	32,828,547.00	10.4%
2) Federal Revenue		8100-8299	3,370,060.00	2,660,814.00	-21.0%
3) Other State Revenue		8300-8599	2,310,506.00	2,124,693.00	-8.0%
4) Other Local Revenue		8600-8799	4,122,352.00	4,013,897.00	-2.6%
5) TOTAL, REVENUES			39,526,330.00	41,627,951.00	5.3%
B. EXPENSES					
1) Certificated Salaries		1000-1999	15,814,033.00	16,145,565.00	2.1%
2) Classified Salaries		2000-2999	4,622,252.00	4,628,407.00	0.1%
3) Employee Benefits		3000-3999	8,279,062.00	9,821,103.00	18.6%
4) Books and Supplies		4000-4999	1,172,362.00	2,071,734.00	76.7%
5) Services and Other Operating Expenses		5000-5999	6,340,081.00	6,466,797.00	2.0%
6) Depreciation and Amortization		6000-6999	971,607.00	980,000.00	0.9%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299, 7400-7499	306,796.00	333,016.00	8.5%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.0%
9) TOTAL, EXPENSES			37,506,193.00	40,446,622.00	7.8%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			2,020,137.00	1,181,329.00	-41.5%
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	282,705.00	0.00	-100.0%
b) Uses		7630-7699	282,705.00	0.00	-100.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)			2,020,137.00	1,181,329.00	-41.5%
F. NET POSITION					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	(4,449,977.80)	8,968,923.20	-301.5%
b) Audit Adjustments		9793	0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			(4,449,977.80)	8,968,923.20	-301.5%
d) Other Restatements		9795	11,398,764.00	0.00	-100.0%
e) Adjusted Beginning Net Position (F1c + F1d)			6,948,786.20	8,968,923.20	29.1%
2) Ending Net Position, June 30 (E + F1e)			8,968,923.20	10,150,252.20	13.2%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	6,927,688.81	0.00	-100.0%
b) Restricted Net Position		9797	1,534,489.00	1,572,564.00	2.5%
c) Unrestricted Net Position		9790	506,745.39	8,577,688.20	1592.7%

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
G. ASSETS					
1) Cash					
a) in County Treasury		9110	12,747,906.49		
1) Fair Value Adjustment to Cash in County Treasury		9111	0.00		
b) in Banks		9120	4,589,778.39		
c) in Revolving Cash Account		9130	0.00		
d) with Fiscal Agent/Trustee		9135	0.00		
e) Collections Awaiting Deposit		9140	0.00		
2) Investments		9150	235,681.17		
3) Accounts Receivable		9200	1,897,030.98		
4) Due from Grantor Government		9290	388,398.39		
5) Due from Other Funds		9310	224,986.75		
6) Stores		9320	0.00		
7) Prepaid Expenditures		9330	82,853.20		
8) Other Current Assets		9340	0.00		
9) Lease Receivable		9380	0.00		
10) Fixed Assets					
a) Land		9410	0.00		
b) Land Improvements		9420	0.00		
c) Accumulated Depreciation - Land Improvements		9425	0.00		
d) Buildings		9430	12,964,525.29		
e) Accumulated Depreciation - Buildings		9435	(7,129,129.92)		
f) Equipment		9440	2,569,965.60		
g) Accumulated Depreciation - Equipment		9445	(1,678,854.92)		
h) Work in Progress		9450	3,700.00		
i) Lease Assets		9460	0.00		
j) Accumulated Amortization-Lease Assets		9465	0.00		
10) TOTAL, ASSETS			26,896,841.42		
H. DEFERRED OUTFLOWS OF RESOURCES					
1) Deferred Outflows of Resources		9490	0.00		
2) TOTAL, DEFERRED OUTFLOWS			0.00		

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
I. LIABILITIES					
1) Accounts Payable		9500	14,596,367.47		
2) Due to Grantor Governments		9590	1,662,097.21		
3) Due to Other Funds		9610	224,986.75		
4) Current Loans		9640	0.00		
5) Unearned Revenue		9650	1,444,466.79		
6) Long-Term Liabilities					
a) Net Pension Liability		9663	0.00		
b) Total/Net OPEB Liability		9664	0.00		
c) Compensated Absences		9665	0.00		
d) COPs Payable		9666	0.00		
e) Leases Payable		9667	0.00		
f) Lease Revenue Bonds Payable		9668	0.00		
g) Other General Long-Term Liabilities		9669	0.00		
7) TOTAL, LIABILITIES			17,927,918.22		
J. DEFERRED INFLOWS OF RESOURCES					
1) Deferred Inflows of Resources		9690	0.00		
2) TOTAL, DEFERRED INFLOWS			0.00		
K. NET POSITION					
Net Position, June 30 (must agree with line F2) (G10 + H2) - (I7 + J2)			8,968,923.20		

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
LCFF SOURCES					
Principal Apportionment					
State Aid - Current Year		8011	9,565,088.00	15,555,226.00	62.6%
Education Protection Account State Aid - Current Year		8012	11,131,516.00	8,577,654.00	-22.9%
State Aid - Prior Years		8019	222,181.00	0.00	-100.0%
LCFF Transfers					
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	8,804,627.00	8,695,667.00	-1.2%
Property Taxes Transfers		8097	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			29,723,412.00	32,828,547.00	10.4%
FEDERAL REVENUE					
Maintenance and Operations		8110	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	0.0%
Child Nutrition Programs		8220	697,245.00	475,000.00	-31.9%
Donated Food Commodities		8221	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	833,673.00	802,782.00	-3.7%
Title I, Part A, Basic	3010	8290	270,114.00	300,583.00	11.3%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	56,270.00	59,695.00	6.1%
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	3,128.00	4,112.00	31.5%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3045, 3060, 3061, 3150, 3155, 3180, 3182, 4037, 4124, 4126, 4127, 4128, 5630	8290	22,209.00	23,175.00	4.3%
Career and Technical Education	3500-3599	8290	37,861.00	37,634.00	-0.6%
All Other Federal Revenue	All Other	8290	1,449,560.00	957,833.00	-33.9%
TOTAL, FEDERAL REVENUE			3,370,060.00	2,660,814.00	-21.0%

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
OTHER STATE REVENUE					
Other State Apportionments					
Special Education Master Plan Current Year	6500	8311	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.0%
Child Nutrition Programs		8520	66,005.00	36,890.00	-44.1%
Mandated Costs Reimbursements		8550	139,084.00	143,764.00	3.4%
Lottery - Unrestricted and Instructional Materials		8560	746,970.00	642,960.00	-13.9%
After School Education and Safety (ASES)	6010	8590	0.00	0.00	0.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	187,163.00	270,374.00	44.5%
Specialized Secondary	7370	8590	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	1,171,284.00	1,030,705.00	-12.0%
TOTAL, OTHER STATE REVENUE			2,310,506.00	2,124,693.00	-8.0%

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 Charter Schools Enterprise Fund
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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
OTHER LOCAL REVENUE					
Sales					
Sale of Equipment/Supplies		8631	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.0%
Food Service Sales		8634	82,628.00	90,000.00	8.9%
All Other Sales		8639	0.00	0.00	0.0%
Leases and Rentals		8650	823,914.00	1,021,000.00	23.9%
Interest		8660	84,856.00	80,000.00	-5.7%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.0%
Fees and Contracts					
Child Development Parent Fees		8673	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.0%
Interagency Services		8677	2,366,050.00	2,272,897.00	-3.9%
All Other Fees and Contracts		8689	0.00	0.00	0.0%
All Other Local Revenue		8699	764,904.00	550,000.00	-28.1%
Tuition		8710	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.0%
Transfers of Apportionments					
Special Education SELPA Transfers					
From Districts or Charter Schools	6500	8791	0.00	0.00	0.0%
From County Offices	6500	8792	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.0%
Other Transfers of Apportionments					
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			4,122,352.00	4,013,897.00	-2.6%
TOTAL, REVENUES			39,526,330.00	41,627,951.00	5.3%

Palisades Charter High
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Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Object

19 64733 1995836
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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
CERTIFICATED SALARIES					
Certificated Teachers' Salaries		1100	13,737,875.00	14,132,876.00	2.9%
Certificated Pupil Support Salaries		1200	1,081,530.00	959,903.00	-11.2%
Certificated Supervisors' and Administrators' Salaries		1300	994,628.00	1,052,786.00	5.8%
Other Certificated Salaries		1900	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			15,814,033.00	16,145,565.00	2.1%
CLASSIFIED SALARIES					
Classified Instructional Salaries		2100	756,331.00	946,773.00	25.2%
Classified Support Salaries		2200	203,248.00	197,325.00	-2.9%
Classified Supervisors' and Administrators' Salaries		2300	377,462.00	295,790.00	-21.6%
Clerical, Technical and Office Salaries		2400	1,925,049.00	2,014,897.00	4.7%
Other Classified Salaries		2900	1,360,162.00	1,173,622.00	-13.7%
TOTAL, CLASSIFIED SALARIES			4,622,252.00	4,628,407.00	0.1%
EMPLOYEE BENEFITS					
STRS		3101-3102	2,510,487.00	3,083,803.00	22.8%
PERS		3201-3202	853,713.00	1,174,227.00	37.5%
OASDI/Medicare/Alternative		3301-3302	599,786.00	611,462.00	1.9%
Health and Welfare Benefits		3401-3402	3,476,166.00	3,808,297.00	9.6%
Unemployment Insurance		3501-3502	103,339.00	103,870.00	0.5%
Workers' Compensation		3601-3602	228,277.00	249,444.00	9.3%
OPEB, Allocated		3701-3702	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	507,294.00	790,000.00	55.7%
TOTAL, EMPLOYEE BENEFITS			8,279,062.00	9,821,103.00	18.6%
BOOKS AND SUPPLIES					
Approved Textbooks and Core Curricula Materials		4100	27,938.00	403,286.00	1343.5%
Books and Other Reference Materials		4200	0.00	0.00	0.0%
Materials and Supplies		4300	411,799.00	729,770.00	77.2%
Noncapitalized Equipment		4400	480,203.00	718,701.00	49.7%
Food		4700	252,422.00	219,977.00	-12.9%
TOTAL, BOOKS AND SUPPLIES			1,172,362.00	2,071,734.00	76.7%

Palisades Charter High
Los Angeles Unified
Los Angeles County

Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Object

19 64733 1995836
Form 62

Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
SERVICES AND OTHER OPERATING EXPENSES					
Subagreements for Services		5100	0.00	0.00	0.0%
Travel and Conferences		5200	43,544.00	204,000.00	368.5%
Dues and Memberships		5300	436,366.00	548,854.00	25.8%
Insurance		5400-5450	407,998.00	436,718.00	7.0%
Operations and Housekeeping Services		5500	727,031.00	613,475.00	-15.6%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	414,814.00	377,673.00	-9.0%
Transfers of Direct Costs		5710	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	4,256,464.00	4,210,077.00	-1.1%
Communications		5900	53,864.00	76,000.00	41.1%
TOTAL, SERVICES AND OTHER OPERATING EXPENSES			6,340,081.00	6,466,797.00	2.0%
DEPRECIATION AND AMORTIZATION					
Depreciation Expense		6900	971,607.00	980,000.00	0.9%
Amortization Expense-Lease Assets		6910	0.00	0.00	0.0%
TOTAL, DEPRECIATION AND AMORTIZATION			971,607.00	980,000.00	0.9%
OTHER OUTGO (excluding Transfers of Indirect Costs)					
Tuition					
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments Payments to Districts or Charter Schools		7141	0.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.0%
Other Transfers Out					
All Other Transfers		7281-7283	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	295,012.00	328,285.00	11.3%
Debt Service					
Debt Service - Interest		7438	11,784.00	4,731.00	-59.9%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			306,796.00	333,016.00	8.5%

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Unaudited Actuals
 Charter Schools Enterprise Fund
 Expenses by Object

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Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS					
Transfers of Indirect Costs		7310	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			0.00	0.00	0.0%
TOTAL, EXPENSES			37,506,193.00	40,446,622.00	7.8%

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Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Object

19 64733 1995836
Form 62

Description	Resource Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
INTERFUND TRANSFERS					
INTERFUND TRANSFERS IN					
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.0%
INTERFUND TRANSFERS OUT					
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.0%
OTHER SOURCES/USES					
SOURCES					
Other Sources					
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.0%
All Other Financing Sources		8979	282,705.00	0.00	-100.0%
(c) TOTAL, SOURCES			282,705.00	0.00	-100.0%
USES					
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.0%
All Other Financing Uses		7699	282,705.00	0.00	-100.0%
(d) TOTAL, USES			282,705.00	0.00	-100.0%
CONTRIBUTIONS					
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.0%

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Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Function

19 64733 1995836
Form 62

Description	Function Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
A. REVENUES					
1) LCFF Sources		8010-8099	29,723,412.00	32,828,547.00	10.4%
2) Federal Revenue		8100-8299	3,370,060.00	2,660,814.00	-21.0%
3) Other State Revenue		8300-8599	2,310,506.00	2,124,693.00	-8.0%
4) Other Local Revenue		8600-8799	4,122,352.00	4,013,897.00	-2.6%
5) TOTAL, REVENUES			39,526,330.00	41,627,951.00	5.3%
B. EXPENSES (Objects 1000-7999)					
1) Instruction	1000-1999		24,627,058.00	27,122,218.00	10.1%
2) Instruction - Related Services	2000-2999		5,725,838.00	6,282,707.00	9.7%
3) Pupil Services	3000-3999		1,973,916.00	1,927,656.00	-2.3%
4) Ancillary Services	4000-4999		0.00	0.00	0.0%
5) Community Services	5000-5999		0.00	0.00	0.0%
6) Enterprise	6000-6999		0.00	0.00	0.0%
7) General Administration	7000-7999		3,153,667.00	3,138,997.00	-0.5%
8) Plant Services	8000-8999		1,718,918.00	1,642,028.00	-4.5%
9) Other Outgo	9000-9999	Except 7600-7699	306,796.00	333,016.00	8.5%
10) TOTAL, EXPENSES			37,506,193.00	40,446,622.00	7.8%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B10)			2,020,137.00	1,181,329.00	-41.5%
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	282,705.00	0.00	-100.0%
b) Uses		7630-7699	282,705.00	0.00	-100.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%

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Unaudited Actuals
Charter Schools Enterprise Fund
Expenses by Function

19 64733 1995836
Form 62

Description	Function Codes	Object Codes	2021-22 Unaudited Actuals	2022-23 Budget	Percent Difference
E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)			2,020,137.00	1,181,329.00	-41.5%
F. NET POSITION					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	(4,449,977.80)	8,968,923.20	-301.5%
b) Audit Adjustments		9793	0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			(4,449,977.80)	8,968,923.20	-301.5%
d) Other Restatements		9795	11,398,764.00	0.00	-100.0%
e) Adjusted Beginning Net Position (F1c + F1d)			6,948,786.20	8,968,923.20	29.1%
2) Ending Net Position, June 30 (E + F1e)			8,968,923.20	10,150,252.20	13.2%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	6,927,688.81	0.00	-100.0%
b) Restricted Net Position		9797	1,534,489.00	1,572,564.00	2.5%
c) Unrestricted Net Position		9790	506,745.39	8,577,688.20	1592.7%

Palisades Charter High
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Unaudited Actuals
 Charter Schools Enterprise Fund
 Exhibit: Restricted Net Position Detail

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 Form 62

Resource	Description	2021-22 Unaudited Actuals	2022-23 Budget
5310		0.00	38,075.00
5466		74,219.00	74,219.00
6266		397,553.00	397,553.00
7028		27,000.00	27,000.00
7412		421,507.00	421,507.00
7413		62,636.00	62,636.00
7425		475,182.00	475,182.00
7810		76,392.00	76,392.00
Total, Restricted Net Position		1,534,489.00	1,572,564.00

Description	2021-22 Unaudited Actuals			2022-23 Budget		
	P-2 ADA	Annual ADA	Funded ADA	Estimated P-2 ADA	Estimated Annual ADA	Estimated Funded ADA
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. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils						
b. Juvenile Halls, Homes, and Camps						
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]						
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	0.00
3. Charter School Funded County Program ADA						
a. County Community Schools						
b. Special Education-Special Day Class						
c. Special Education-NPS/LCI						
d. Special Education Extended Year						
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools						
f. Total, Charter School Funded County Program ADA (Sum of Lines C3a through C3e)	0.00	0.00	0.00	0.00	0.00	0.00
4. TOTAL CHARTER SCHOOL ADA (Sum of Lines C1, C2d, and C3f)	0.00	0.00	0.00	0.00	0.00	0.00
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	2,779.37	2,779.37	2,779.37	2,820.00	2,820.00	2,820.00
6. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils						
b. Juvenile Halls, Homes, and Camps						
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]						
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	0.00
7. Charter School Funded County Program ADA						
a. County Community Schools						
b. Special Education-Special Day Class						
c. Special Education-NPS/LCI						
d. Special Education Extended Year						
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools						
f. Total, Charter School Funded County Program ADA (Sum of Lines C7a through C7e)	0.00	0.00	0.00	0.00	0.00	0.00
8. TOTAL CHARTER SCHOOL ADA (Sum of Lines C5, C6d, and C7f)	2,779.37	2,779.37	2,779.37	2,820.00	2,820.00	2,820.00
9. TOTAL CHARTER SCHOOL ADA Reported in Fund 01, 09, or 62 (Sum of Lines C4 and C8)	2,779.37	2,779.37	2,779.37	2,820.00	2,820.00	2,820.00

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Unaudited Actuals
 2021-22 Unaudited Actuals
 Every Student Succeeds Act Maintenance of Effort Expenditures

19 64733 1995836
 Form ESMOE

Section I - Expenditures	Funds 01, 09, and 62			2021-22 Expenditures
	Goals	Functions	Objects	
A. Total state, federal, and local expenditures (all resources)	All	All	1000-7999	37,788,898.00
B. Less all federal expenditures not allowed for MOE (Resources 3000-5999, except 3385)	All	All	1000-7999	2,545,725.00
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 except 6600, 6910	948,229.00
3. Debt Service	All	9100	5400-5450, 5800, 7430-7439	11,784.00
4. Other Transfers Out	All	9200	7200-7299	295,012.00
5. Interfund Transfers Out	All	9300	7600-7629	0.00
6. All Other Financing Uses	All	9100	7699	282,705.00
		9200	7651	
7. Nonagency	7100-7199	All except 5000-5999, 9000-9999	1000-7999	4,993,843.00
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)				6,531,573.00
D. Plus additional MOE expenditures:			1000-7143, 7300-7439	
1. Expenditures to cover deficits for food services (Funds 13 and 61) (If negative, then zero)	All	All	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)				28,711,600.00

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Unaudited Actuals
2021-22 Unaudited Actuals
Every Student Succeeds Act Maintenance of Effort Expenditures

19 64733 1995836
Form ESMOE

Section II - Expenditures Per ADA		2021-22 Annual ADA/ Exps. Per ADA
A. Average Daily Attendance (Form A, Annual ADA column, Line C9)		2,779.37
B. Expenditures per ADA (Line I.E divided by Line II.A)		10,330.25
Section III - MOE Calculation (For data collection only. Final determination will be done by CDE)		
	Total	Per ADA
A. Base expenditures (Preloaded expenditures from prior year official CDE MOE Calculation) (Note: If the prior year MOE was not met, CDE has adjusted the prior year base to 90 percent of the preceding prior year amount rather than the actual prior year expenditure amount.)	27,410,506.43	9,697.65
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)	27,410,506.43	9,697.65
B. Required effort (Line A.2 times 90%)	24,669,455.79	8,727.89
C. Current year expenditures (Line I.E and Line II.B)	28,711,600.00	10,330.25
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 2023-24 may be reduced by the lower of the two percentages)	0.00%	0.00%

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Unaudited Actuals
 2021-22 Unaudited Actuals
 Every Student Succeeds Act Maintenance of Effort Expenditures

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 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

Part I - General Administrative Share of Plant Services Costs

California's indirect cost plan allows that the general administrative costs in the indirect cost pool may include that portion of plant services costs (maintenance and operations costs and facilities rents and leases costs) attributable to the general administrative offices. The calculation of the plant services costs attributed to general administration and included in the pool is standardized and automated using the percentage of salaries and benefits relating to general administration as proxy for the percentage of square footage occupied by general administration.

A. Salaries and Benefits - Other General Administration and Centralized Data Processing

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 7200-7700, goals 0000 and 9000) 345,061.00
- 2. Contracted general administrative positions not paid through payroll
 - a. Enter the costs, if any, of general administrative positions performing services ON SITE but paid through a contract, rather than through payroll, in functions 7200-7700, goals 0000 and 9000, Object 5800. _____
 - b. If an amount is entered on Line A2a, provide the title, duties, and approximate FTE of each general administrative position paid through a contract. Retain supporting documentation in case of audit.

B. Salaries and Benefits - All Other Activities

- 1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 1000-6999, 7100-7180, & 8100-8400; Functions 7200-7700, all goals except 0000 & 9000) 28,370,286.00

C. Percentage of Plant Services Costs Attributable to General Administration

(Line A1 plus Line A2a, divided by Line B1; zero if negative) (See Part III, Lines A5 and A6) 1.22%

Part II - Adjustments for Employment Separation Costs

When an employee separates from service, the local educational agency (LEA) may incur costs associated with the separation in addition to the employee's regular salary and benefits for the final pay period. These additional costs can be categorized as "normal" or "abnormal or mass" separation costs.

Normal separation costs include items such as pay for accumulated unused leave or routine severance pay authorized by governing board policy. Normal separation costs are not allowable as direct costs to federal programs, but are allowable as indirect costs. State programs may have similar restrictions. Where federal or state program guidelines required that the LEA charge an employee's normal separation costs to an unrestricted resource rather than to the restricted program in which the employee worked, the LEA may identify and enter these costs on Line A for inclusion in the indirect cost pool.

Abnormal or mass separation costs are those costs resulting from actions taken by an LEA to influence employees to terminate their employment earlier than they normally would have. Abnormal or mass separation costs include retirement incentives such as a Golden Handshake or severance packages negotiated to effect termination. Abnormal or mass separation costs may not be charged to federal programs as either direct costs or indirect costs. Where an LEA paid abnormal or mass separation costs on behalf of positions in general administrative functions included in the indirect cost pool, the LEA must identify and enter these costs on Line B for exclusion from the pool.

A. Normal Separation Costs (optional)

Enter any normal separation costs paid on behalf of employees of restricted state or federal programs that were charged to an unrestricted resource (0000-1999) in funds 01, 09, and 62 with functions 1000-6999 or 8100-8400 rather than to the restricted program. These costs will be moved in Part III from base costs to the indirect cost pool. Retain supporting documentation. _____

B. Abnormal or Mass Separation Costs (required)

Enter any abnormal or mass separation costs paid on behalf of general administrative positions charged to unrestricted resources (0000-1999) in funds 01, 09, and 62 with functions 7200-7700. These costs will be moved in Part III from the indirect cost pool to base costs. If none, enter zero. 0.00

Part III - Indirect Cost Rate Calculation (Funds 01, 09, and 62, unless indicated otherwise)

A. Indirect Costs

1. Other General Administration, less portion charged to restricted resources or specific goals (Functions 7200-7600, objects 1000-5999, minus Line B9)	1,872,481.35
2. Centralized Data Processing, less portion charged to restricted resources or specific goals (Function 7700, objects 1000-5999, minus Line B10)	22,847.00
3. External Financial Audit - Single Audit (Function 7190, resources 0000-1999, goals 0000 and 9000, objects 5000-5999)	0.00
4. Staff Relations and Negotiations (Function 7120, resources 0000-1999, goals 0000 and 9000, objects 1000-5999)	0.00
5. Plant Maintenance and Operations (portion relating to general administrative offices only) (Functions 8100-8400, objects 1000-5999 except 5100, times Part I, Line C)	20,970.80
6. Facilities Rents and Leases (portion relating to general administrative offices only) (Function 8700, resources 0000-1999, objects 1000-5999 except 5100, times Part I, Line C)	0.00
7. Adjustment for Employment Separation Costs	
a. Plus: Normal Separation Costs (Part II, Line A)	0.00
b. Less: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
8. Total Indirect Costs (Lines A1 through A7a, minus Line A7b)	1,916,299.15
9. Carry-Forward Adjustment (Part IV, Line F)	911,556.62
10. Total Adjusted Indirect Costs (Line A8 plus Line A9)	2,827,855.77

B. Base Costs

1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	24,598,973.00
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	5,725,838.00
3. Pupil Services (Functions 3000-3999, objects 1000-5999 except 4700 and 5100)	1,718,850.00
4. Ancillary Services (Functions 4000-4999, objects 1000-5999 except 5100)	0.00
5. Community Services (Functions 5000-5999, objects 1000-5999 except 5100)	0.00
6. Enterprise (Function 6000, objects 1000-5999 except 4700 and 5100)	0.00
7. Board and Superintendent (Functions 7100-7180, objects 1000-5999, minus Part III, Line A4)	98,551.65
8. External Financial Audit - Single Audit and Other (Functions 7190-7191, objects 5000-5999, minus Part III, Line A3)	0.00
9. Other General Administration (portion charged to restricted resources or specific goals only) (Functions 7200-7600, resources 2000-9999, objects 1000-5999; Functions 7200-7600, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	218,909.00
10. Centralized Data Processing (portion charged to restricted resources or specific goals only) (Function 7700, resources 2000-9999, objects 1000-5999; Function 7700, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
11. Plant Maintenance and Operations (all except portion relating to general administrative offices) (Functions 8100-8400, objects 1000-5999 except 5100, minus Part III, Line A5)	1,697,947.20
12. Facilities Rents and Leases (all except portion relating to general administrative offices) (Function 8700, objects 1000-5999 except 5100, minus Part III, Line A6)	0.00
13. Adjustment for Employment Separation Costs	
a. Less: Normal Separation Costs (Part II, Line A)	0.00
b. Plus: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
14. Student Activity (Fund 08, functions 4000-5999, objects 1000-5999 except 5100)	0.00
15. Adult Education (Fund 11, functions 1000-6999, 8100-8400, and 8700, objects 1000-5999 except 5100)	0.00
16. Child Development (Fund 12, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
17. Cafeteria (Funds 13 & 61, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
18. Foundation (Funds 19 & 57, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
19. Total Base Costs (Lines B1 through B12 and Lines B13b through B18, minus Line B13a)	34,059,068.85

C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment

(For information only - not for use when claiming/recovering indirect costs)
 (Line A8 divided by Line B19) 5.63%

D. Preliminary Proposed Indirect Cost Rate

(For final approved fixed-with-carry-forward rate for use in 2023-24 see www.cde.ca.gov/fg/ac/ic)
 (Line A10 divided by Line B19) 8.30%

Part IV - Carry-forward Adjustment

The carry-forward adjustment is an after-the-fact adjustment for the difference between indirect costs recoverable using the indirect cost rate approved for use in a given year, and the actual indirect costs incurred in that year. The carry-forward adjustment eliminates the need for LEAs to file amended federal reports when their actual indirect costs vary from the estimated indirect costs on which the approved rate was based.

Where the ratio of indirect costs incurred in the current year is less than the estimated ratio of indirect costs on which the approved rate for use in the current year was based, the carry-forward adjustment is limited by using either the approved rate times current year base costs, or the highest rate actually used to recover costs from any program times current year base costs, if the highest rate used was less than the approved rate. Rates used to recover costs from programs are displayed in Exhibit A.

A. Indirect costs incurred in the current year (Part III, Line A8)	<u>1,916,299.15</u>
B. Carry-forward adjustment from prior year(s)	
1. Carry-forward adjustment from the second prior year	<u>0.00</u>
2. Carry-forward adjustment amount deferred from prior year(s), if any	<u>0.00</u>
C. Carry-forward adjustment for under- or over-recovery in the current year	
1. Under-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus (approved indirect cost rate (2.95%) times Part III, Line B19); zero if negative	<u>911,556.62</u>
2. Over-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus the lesser of (approved indirect cost rate (2.95%) times Part III, Line B19) or (the highest rate used to recover costs from any program (2.95%) times Part III, Line B19); zero if positive	<u>0.00</u>
D. Preliminary carry-forward adjustment (Line C1 or C2)	<u>911,556.62</u>
E. Optional allocation of negative carry-forward adjustment over more than one year	
Where a negative carry-forward adjustment causes the proposed approved rate to fall below zero or would reduce the rate at which the LEA could recover indirect costs to such an extent that it would cause the LEA significant fiscal harm, the LEA may request that the carry-forward adjustment be allocated over more than one year. Where allocation of a negative carry-forward adjustment over more than one year does not resolve a negative rate, the CDE will work with the LEA on a case-by-case basis to establish an approved rate.	
Option 1. Preliminary proposed approved rate (Part III, Line D) if entire negative carry-forward adjustment is applied to the current year calculation:	<u>not applicable</u>
Option 2. Preliminary proposed approved rate (Part III, Line D) if one-half of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	<u>not applicable</u>
Option 3. Preliminary proposed approved rate (Part III, Line D) if one-third of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	<u>not applicable</u>
LEA request for Option 1, Option 2, or Option 3	<u>1</u>
F. Carry-forward adjustment used in Part III, Line A9 (Line D minus amount deferred if Option 2 or Option 3 is selected)	<u>911,556.62</u>

Palisades Charter High
 Los Angeles Unified
 Los Angeles County

Unaudited Actuals
 2021-22 Unaudited Actuals
 Exhibit A: Indirect Cost Rates Charged to Programs

19 64733 1995836
 Form ICR

Approved indirect cost rate: 2.95%
 Highest rate used in any program: 2.95%

Fund	Resource	Eligible Expenditures (Objects 1000-5999 except 4700 & 5100)	Indirect Costs Charged (Objects 7310 and 7350)	Rate Used
62	3550	36,777.00	1,084.00	2.95%
62	9010	4,878,294.00	115,549.00	2.37%

Palisades Charter High
Los Angeles Unified
Los Angeles County

Unaudited Actuals
2021-22 Unaudited Actuals
LOTTERY REPORT
Revenues, Expenditures and
Ending Balances - All Funds

19 64733 1995836
Form L

Description	Object Codes	Lottery: Unrestricted (Resource 1100)	Transferred to Other Resources for Expenditure	Lottery: Instructional Materials (Resource 6300)*	Totals
A. AMOUNT AVAILABLE FOR THIS FISCAL YEAR					
1. Adjusted Beginning Fund Balance	9791-9795	0.00		0.00	0.00
2. State Lottery Revenue	8560	516,980.00		229,990.00	746,970.00
3. Other Local Revenue	8600-8799	0.00		0.00	0.00
4. Transfers from Funds of Lapsed/Reorganized Districts	8965	0.00		0.00	0.00
5. Contributions from Unrestricted Resources (Total must be zero)	8980	0.00			0.00
6. Total Available (Sum Lines A1 through A5)		516,980.00	0.00	229,990.00	746,970.00
B. EXPENDITURES AND OTHER FINANCING USES					
1. Certificated Salaries	1000-1999	0.00			0.00
2. Classified Salaries	2000-2999	0.00			0.00
3. Employee Benefits	3000-3999	0.00			0.00
4. Books and Supplies	4000-4999	0.00		229,990.00	229,990.00
5. a. Services and Other Operating Expenditures (Resource 1100)	5000-5999	516,980.00			516,980.00
b. Services and Other Operating Expenditures (Resource 6300)	5000-5999, except 5100, 5710, 5800				
c. Duplicating Costs for Instructional Materials (Resource 6300)	5100, 5710, 5800				
6. Capital Outlay	6000-6999	0.00			0.00
7. Tuition	7100-7199	0.00			0.00
8. Interagency Transfers Out					
a. To Other Districts, County Offices, and Charter Schools	7211,7212,7221, 7222,7281,7282	0.00			0.00
b. To JPAs and All Others	7213,7223, 7283,7299	0.00			0.00
9. Transfers of Indirect Costs	7300-7399				
10. Debt Service	7400-7499	0.00			0.00
11. All Other Financing Uses	7630-7699	0.00			0.00
12. Total Expenditures and Other Financing Uses (Sum Lines B1 through B11)		516,980.00	0.00	229,990.00	746,970.00
C. ENDING BALANCE (Must equal Line A6 minus Line B12)					
	979Z	0.00	0.00	0.00	0.00
D. COMMENTS:					

Data from this report will be used to prepare a report to the Legislature as required by Control Section 24.60 of the Budget Act.

*Pursuant to Government Code Section 8880.4(a)(2)(B) and the definition in Education Code Section 60010(h), Resource 6300 funds are to be used for the purchase of instructional materials only. Any amounts in the shaded cells of this column should be reviewed for appropriateness.

Unaudited Actuals
2021-22
General Fund and Charter Schools Funds
Program Cost Report
Schedule of Allocation Factors (AF) for Support Costs

	----- Teacher Full-Time Equivalents -----				----- Classroom Units -----		Pupils Transported
	Instructional Supervision and Administration (Functions 2100-2200)	Library, Media, Technology and Other Instructional Resources (Functions 2420-2495)	School Administration (Function 2700)	Pupil Support Services (Functions 3100-3199 & 3900)	Plant Maintenance and Operations (Functions 8100-8400)	Facilities Rents and Leases (Function 8700)	Pupil Transportation (Function 3600)
A. Amount of Undistributed Expenditures, Funds 01, 09, and 62, Goals 0000 and 9000 (will be allocated based on factors input)	0.00	211,686.00	4,519,524.00	0.00	1,718,918.00	0.00	175,802.00
B. Enter Allocation Factor(s) by Goal: (Note: Allocation factors are only needed for a column if there are undistributed expenditures in line A.)	FTE Factor(s)	FTE Factor(s)	FTE Factor(s)	FTE Factor(s)	CU Factor(s)	CU Factor(s)	PT Factor(s)
Instructional Goals Description							
0001 Pre-Kindergarten							
1110 Regular Education, K-12		4.00	54.00		116.00		10.00
3100 Alternative Schools							
3200 Continuation Schools							
3300 Independent Study Centers							
3400 Opportunity Schools							
3550 Community Day Schools							
3700 Specialized Secondary Programs							
3800 Career Technical Education							
4110 Regular Education, Adult							
4610 Adult Independent Study Centers							
4620 Adult Correctional Education							
4630 Adult Career Technical Education							
4760 Bilingual							
4850 Migrant Education							
5000-5999 Special Education (allocated to 5001)							
6000 ROC/P							
Other Goals Description							
7110 Nonagency - Educational							
7150 Nonagency - Other							
8100 Community Services							
8500 Child Care and Development Services							
Other Funds Description							
-- Adult Education (Fund 11)							
-- Child Development (Fund 12)							
-- Cafeteria (Funds 13 & 61)							
C. Total Allocation Factors	0.00	4.00	54.00	0.00	116.00	0.00	10.00

Palisades Charter High
Los Angeles Unified
Los Angeles County

Unaudited Actuals
2021-22
General Fund and Charter Schools Funds
Program Cost Report

19 64733 1995836
Form PCR

Goal	Program/Activity	----- Direct Costs -----			Central Admin Costs (col. 3 x Sch. CAC line E) Column 4	Other Costs (Schedule OC) Column 5	Total Costs by Program (col. 3 + 4 + 5) Column 6
		Direct Charged (Schedule DCC) Column 1	Allocated (Schedule AC) Column 2	Subtotal (col. 1 + 2) Column 3			
Instructional Goals							
0001	Pre-Kindergarten	0.00	0.00	0.00	0.00		0.00
1110	Regular Education, K-12	21,610,982.00	6,625,930.00	28,236,912.00	2,671,028.75		30,907,940.75
3100	Alternative Schools	0.00	0.00	0.00	0.00		0.00
3200	Continuation Schools	0.00	0.00	0.00	0.00		0.00
3300	Independent Study Centers	0.00	0.00	0.00	0.00		0.00
3400	Opportunity Schools	0.00	0.00	0.00	0.00		0.00
3550	Community Day Schools	0.00	0.00	0.00	0.00		0.00
3700	Specialized Secondary Programs	0.00	0.00	0.00	0.00		0.00
3800	Career Technical Education	223,940.00	0.00	223,940.00	21,183.27		245,123.27
4110	Regular Education, Adult	0.00	0.00	0.00	0.00		0.00
4610	Adult Independent Study Centers	0.00	0.00	0.00	0.00		0.00
4620	Adult Correctional Education	0.00	0.00	0.00	0.00		0.00
4630	Adult Career Technical Education	0.00	0.00	0.00	0.00		0.00
4760	Bilingual	0.00	0.00	0.00	0.00		0.00
4850	Migrant Education	0.00	0.00	0.00	0.00		0.00
5000-5999	Special Education	0.00	0.00	0.00	0.00		0.00
6000	Regional Occupational Ctr/Prg (ROC/P)	0.00	0.00	0.00	0.00		0.00
Other Goals							
7110	Nonagency - Educational	4,878,294.00	0.00	4,878,294.00	461,454.98		5,339,748.98
7150	Nonagency - Other	0.00	0.00	0.00	0.00		0.00
8100	Community Services	0.00	0.00	0.00	0.00		0.00
8500	Child Care and Development Services	0.00	0.00	0.00	0.00		0.00
Other Costs							
----	Food Services					706,584.00	706,584.00
----	Enterprise					0.00	0.00
----	Facilities Acquisition & Construction					0.00	0.00
----	Other Outgo					589,501.00	589,501.00
Other Funds							
----	Adult Education, Child Development, Cafeteria, Foundation ([Column 3 + CAC, line C5] times CAC, line E)		0.00	0.00	0.00		0.00
----	Indirect Cost Transfers to Other Funds (Net of Funds 01, 09, 62, Function 7210, Object 7350)				0.00		0.00
----	Total General Fund and Charter Schools Funds Expenditures	26,713,216.00	6,625,930.00	33,339,146.00	3,153,667.00	1,296,085.00	37,788,898.00

Unaudited Actuals
2021-22
General Fund and Charter Schools Funds
Program Cost Report
Schedule of Direct Charged Costs (DCC)

Goal	Type of Program	Instruction (Functions 1000-1999)	Instructional Supervision and Administration (Functions 2100-2200)	Library, Media, Technology and Other Instructional Resources (Functions 2420-2495)	School Administration (Function 2700)	Pupil Support Services (Functions 3110-3160 and 3900)	Pupil Transportation (Function 3600)	Ancillary Services (Functions 4000-4999)	Community Services (Functions 5000-5999)	General Administration (Functions 7000-7999, except 7210)*	Plant Maintenance and Operations (Functions 8100-8400)	Facilities Rents and Leases (Function 8700)	Total
Instructional Goals													
0001	Pre-Kindergarten	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
1110	Regular Education, K-12	19,667,609.00	851,843.00	0.00	0.00	1,081,530.00	10,000.00	0.00			0.00	0.00	21,610,982.00
3100	Alternative Schools	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3200	Continuation Schools	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3300	Independent Study Centers	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3400	Opportunity Schools	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3550	Community Day Schools	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3700	Specialized Secondary Programs	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
3800	Career Technical Education	223,940.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	223,940.00
4110	Regular Education, Adult	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
4610	Adult Independent Study Centers	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
4620	Adult Correctional Education	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
4630	Adult Career Technical Education	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
4760	Bilingual	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
4850	Migrant Education	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
5000-5999	Special Education	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
6000	ROC/P	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00
Other Goals													
7110	Nonagency - Educational	4,735,509.00	142,785.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,878,294.00
7150	Nonagency - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8100	Community Services		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8500	Child Care and Development Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Direct Charged Costs		24,627,058.00	994,628.00	0.00	0.00	1,081,530.00	10,000.00	0.00	0.00	0.00	0.00	0.00	26,713,216.00

* Functions 7100-7199 for goals 8100 and 8500

Palisades Charter High
Los Angeles Unified
Los Angeles County

Unaudited Actuals
2021-22
General Fund and Charter Schools Funds
Program Cost Report
Schedule of Allocated Support Costs (AC)

19 64733 1995836
Form PCR

Goal	Type of Program	Allocated Support Costs (Based on factors input on Form PCRAF)			Total
		Full-Time Equivalents	Classroom Units	Pupils Transported	
Instructional Goals					
0001	Pre-Kindergarten	0.00	0.00	0.00	0.00
1110	Regular Education, K-12	4,731,210.00	1,718,918.00	175,802.00	6,625,930.00
3100	Alternative Schools	0.00	0.00	0.00	0.00
3200	Continuation Schools	0.00	0.00	0.00	0.00
3300	Independent Study Centers	0.00	0.00	0.00	0.00
3400	Opportunity Schools	0.00	0.00	0.00	0.00
3550	Community Day Schools	0.00	0.00	0.00	0.00
3700	Specialized Secondary Programs	0.00	0.00	0.00	0.00
3800	Career Technical Education	0.00	0.00	0.00	0.00
4110	Regular Education, Adult	0.00	0.00	0.00	0.00
4610	Adult Independent Study Centers	0.00	0.00	0.00	0.00
4620	Adult Correctional Education	0.00	0.00	0.00	0.00
4630	Adult Career Technical Education	0.00	0.00	0.00	0.00
4760	Bilingual	0.00	0.00	0.00	0.00
4850	Migrant Education	0.00	0.00	0.00	0.00
5000-5999	Special Education (allocated to 5001)	0.00	0.00	0.00	0.00
6000	ROC/P	0.00	0.00	0.00	0.00
Other Goals					
7110	Nonagency - Educational	0.00	0.00	0.00	0.00
7150	Nonagency - Other	0.00	0.00	0.00	0.00
8100	Community Services	0.00	0.00	0.00	0.00
8500	Child Care and Development Svcs.	0.00	0.00	0.00	0.00
Other Funds					
--	Adult Education (Fund 11)		0.00		0.00
--	Child Development (Fund 12)	0.00	0.00	0.00	0.00
--	Cafeteria (Funds 13 and 61)		0.00		0.00
Total Allocated Support Costs		4,731,210.00	1,718,918.00	175,802.00	6,625,930.00

Palisades Charter High
Los Angeles Unified
Los Angeles County

Unaudited Actuals
2021-22
Program Cost Report
Schedule of Central Administration Costs (CAC)

19 64733 1995836
Form PCR

A. Central Administration Costs in General Fund and Charter Schools Funds	
1 Board and Superintendent (Funds 01, 09, and 62, Functions 7100-7180, Goals 0000-6999 and 9000, Objects 1000-7999)	98,551.65
2 External Financial Audits (Funds 01, 09, and 62, Functions 7190-7191, Goals 0000-6999 and 9000, Objects 1000-7999)	0.00
3 Other General Administration (Funds 01, 09, and 62, Functions 7200-7600 except 7210, Goal 0000, Objects 1000-7999)	3,032,268.35
4 Centralized Data Processing (Funds 01, 09, and 62, Function 7700, Goal 0000, Objects 1000-7999)	22,847.00
5 Total Central Administration Costs in General Fund and Charter Schools Funds	3,153,667.00
B. Direct Charged and Allocated Costs in General Fund and Charter Schools Funds	
1 Total Direct Charged Costs (from Form PCR, Column 1, Total)	26,713,216.00
2 Total Allocated Costs (from Form PCR, Column 2, Total)	6,625,930.00
3 Total Direct Charged and Allocated Costs in General Fund and Charter Schools Funds	33,339,146.00
C. Direct Charged Costs in Other Funds	
1 Adult Education (Fund 11, Objects 1000-5999, except 5100)	0.00
2 Child Development (Fund 12, Objects 1000-5999, except 5100)	0.00
3 Cafeteria (Funds 13 & 61, Objects 1000-5999, except 5100)	0.00
4 Foundation (Funds 19 & 57, Objects 1000-5999, except 5100)	0.00
5 Total Direct Charged Costs in Other Funds	0.00
D. Total Direct Charged and Allocated Costs (B3 + C5)	33,339,146.00
E. Ratio of Central Administration Costs to Direct Charged and Allocated Costs (A5/D)	9.46%

Palisades Charter High
 Los Angeles Unified
 Los Angeles County

Unaudited Actuals
 2021-22
 General Fund and Charter Schools Funds
 Program Cost Report
 Schedule of Other Costs (OC)

19 64733 1995836
 Form PCR

Type of Activity	Food Services (Function 3700)	Enterprise (Function 6000)	Facilities Acquisition & Construction (Function 8500)	Other Outgo (Functions 9000-9999)	Total
Food Services (Objects 1000-5999, 6400-6910)	706,584.00				706,584.00
Enterprise (Objects 1000-5999, 6400-6910)		0.00			0.00
Facilities Acquisition & Construction (Objects 1000-6600)			0.00		0.00
Other Outgo (Objects 1000-7999)				589,501.00	589,501.00
Total Other Costs	706,584.00	0.00	0.00	589,501.00	1,296,085.00

	Unaudited Balance July 1	Audit Adjustments/ Restatements	Audited Balance July 1	Increases	Decreases	Ending Balance June 30
Governmental Activities:						
Capital assets not being depreciated:						
Land			0.00			0.00
Work in Progress	3,700.00		3,700.00			3,700.00
Total capital assets not being depreciated	3,700.00	0.00	3,700.00	0.00	0.00	3,700.00
Capital assets being depreciated:						
Land Improvements			0.00			0.00
Buildings	12,715,426.87		12,715,426.87	267,112.23		12,982,539.10
Equipment	2,382,935.00		2,382,935.00	169,016.79		2,551,951.79
Total capital assets being depreciated	15,098,361.87	0.00	15,098,361.87	436,129.02	0.00	15,534,490.89
Accumulated Depreciation for:						
Land Improvements			0.00			0.00
Buildings	(4,848,016.64)		(4,848,016.64)		2,281,113.28	(7,129,129.92)
Equipment	(1,059,896.65)		(1,059,896.65)		618,958.27	(1,678,854.92)
Total accumulated depreciation	(5,907,913.29)	0.00	(5,907,913.29)	0.00	2,900,071.55	(8,807,984.84)
Total capital assets being depreciated, net excluding lease assets	9,190,448.58	0.00	9,190,448.58	436,129.02	2,900,071.55	6,726,506.05
Lease Assets			0.00			0.00
Accumulated amortization for lease assets			0.00			0.00
Total lease assets, net	0.00	0.00	0.00	0.00	0.00	0.00
Governmental activity capital assets, net	9,194,148.58	0.00	9,194,148.58	436,129.02	2,900,071.55	6,730,206.05
Business-Type Activities:						
Capital assets not being depreciated:						
Land			0.00			0.00
Work in Progress			0.00			0.00
Total capital assets not being depreciated	0.00	0.00	0.00	0.00	0.00	0.00
Capital assets being depreciated:						
Land Improvements			0.00			0.00
Buildings			0.00			0.00
Equipment			0.00			0.00
Total capital assets being depreciated	0.00	0.00	0.00	0.00	0.00	0.00
Accumulated Depreciation for:						
Land Improvements			0.00			0.00
Buildings			0.00			0.00
Equipment			0.00			0.00
Total accumulated depreciation	0.00	0.00	0.00	0.00	0.00	0.00
Total capital assets being depreciated, net excluding lease assets	0.00	0.00	0.00	0.00	0.00	0.00
Lease Assets			0.00			0.00
Accumulated amortization for lease assets			0.00			0.00
Total lease assets, net	0.00	0.00	0.00	0.00	0.00	0.00
Business-type activity capital assets, net	0.00	0.00	0.00	0.00	0.00	0.00

Palisades Charter High
 Los Angeles Unified
 Los Angeles County

Unaudited Actuals
 2021-22 Unaudited Actuals
 Schedule of Long-Term Liabilities

19 64733 1995836
 Form DEBT

	Unaudited Balance July 1	Audit Adjustments/ Restatements	Audited Balance July 1	Increases	Decreases	Ending Balance June 30	Amounts Due Within One Year
Governmental Activities:							
General Obligation Bonds Payable			0.00			0.00	
State School Building Loans Payable			0.00			0.00	
Certificates of Participation Payable			0.00			0.00	
Leases Payable			0.00			0.00	
Lease Revenue Bonds Payable			0.00			0.00	
Other General Long-Term Debt			0.00			0.00	
Net Pension Liability			0.00			0.00	
Total/Net OPEB Liability	21,209,023.67		21,209,023.67		6,778,092.00	14,430,931.67	
Compensated Absences Payable			0.00			0.00	
Governmental activities long-term liabilities	21,209,023.67	0.00	21,209,023.67	0.00	6,778,092.00	14,430,931.67	0.00
Business-Type Activities:							
General Obligation Bonds Payable			0.00			0.00	
State School Building Loans Payable			0.00			0.00	
Certificates of Participation Payable			0.00			0.00	
Leases Payable			0.00			0.00	
Lease Revenue Bonds Payable			0.00			0.00	
Other General Long-Term Debt	4,606,000.00		4,606,000.00		4,606,000.00	0.00	
Net Pension Liability			0.00			0.00	
Total/Net OPEB Liability			0.00			0.00	
Compensated Absences Payable			0.00			0.00	
Business-type activities long-term liabilities	4,606,000.00	0.00	4,606,000.00	0.00	4,606,000.00	0.00	0.00

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Unaudited Actuals
2021-22 Unaudited Actuals
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 3307, 3309, 3312, 3318, and 3332. PASSED

BALANCE-FDxRS - (F) - Adjusted Beginning Fund Balance plus Revenues minus Expenditures minus Assets minus Deferred Outflows of Resources plus Liabilities plus Deferred Inflows of Resources, must total zero by fund and resource. PASSED

PY-EFB=CY-BFB - (F) - Prior year ending fund balance (preloaded from last year's unaudited actuals submission) must equal current year beginning fund balance (Object 9791). PASSED

PY-EFB=CY-BFB-RES-CH - (F) - Prior year ending balance (preloaded from last year's unaudited actuals submission) must equal current year beginning balance (Object 9791), by fund and resource. To assist those charter schools that are reporting in SACS for the current year, but reported in the alternative form last year, Charter School Alternative Form prior year ending fund balances have been included in the SACS software to compare to the total of the SACS beginning balances for all resources. PASSED

GENERAL LEDGER CHECKS

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

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

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

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

DUE-FROM=DUE-TO - (F) - Due from Other Funds (Object 9310) must equal Due to Other Funds (Object 9610). PASSED

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

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

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

INTRAFFD-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

CEFB=FD-EQUITY - (F) - Components of Ending Fund Balance/Net Position (objects 9710-9790, 9796, and 9797) must agree with Fund Equity (Assets [objects 9100-9489] plus Deferred Outflows of Resources [objects 9490-9499] minus Liabilities [objects 9500-9689] minus Deferred Inflows of Resources [objects 9690-9699]). 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	9010	-75,466.77

Explanation:Special ed began the year with a negative ending balance due to a liability owed for special ed revenue.

Total of negative resource balances for Fund 62 -75,466.77

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

EXCEPTION

FUND	RESOURCE	OBJECT	VALUE
62	0000	2100	-13,416.00

Explanation:This is a contra account showing an offset by outside funds.

62	5310	9790	-15,346.11
----	------	------	------------

Explanation:Cafeteria began the year with a negative ending balance - due to fixed assets depreciation.

62	9010	9790	-75,466.77
----	------	------	------------

Explanation:Special ed began the year with a negative ending balance due to a liability owed for special ed revenue.

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

AR-AP-POSITIVE - (F) - Accounts Receivable (Object 9200), Due from Other Funds (Object 9310), Accounts Payable (Object 9500), and Due to Other Funds (Object 9610) should have a positive balance by resource, by 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

CONSOLIDATED-ADM-BAL - (F) - Net expenditures and assets minus liabilities must equal zero for Resource 3155, ESEA (ESSA): Consolidated Administrative Funds.

PASSED

NET-INV-CAP-ASSETS - (W) - If capital asset amounts are imported/ keyed, objects 9400-9489, (Capital Assets) in funds 61-95, then an amount should be recorded for Object 9796 (Net Investment in Capital Assets) within the same fund.

PASSED

SUPPLEMENTAL CHECKS

ESMOE-ADA - (F) - If Form ESMOE is completed, ADA must be reported in Section II, Line A.

PASSED

ASSET-IMPORT - (F) - If capital asset amounts are imported/keyed (Function 8500, Facilities Acquisition and Construction, or objects 6XXX, Capital Outlay; or objects 9400-9489, Capital Assets, in funds 61-67), then capital asset supplemental data (Form ASSET) must be provided. PASSED

DEBT-IMPORT - (F) - If long-term debt amounts are imported/keyed, the long-term debt supplemental data (Form DEBT) must be provided. PASSED

LOT-IMPORT - (F) - If lottery amounts are imported in resources 1100 and/or 6300, then the Lottery Report, Form L, must be completed and saved. PASSED

LOT-CONTRIB-IMPORT-A - (F) - If State Lottery revenue (Resource 1100) is contributed to other resources (Object 8980), supplemental data for those contributions must be entered in Form L. PASSED

LOT-CONTRIB-IMPORT-B - (W) - If State Lottery revenue (Resource 1100) is contributed to other resources (Object 8980), supplemental expenditure data for those contributions should be entered in Form L. PASSED

ESMOE-IMPORT - (F) - If Every Student Succeeds Act amounts are imported, then the Every Student Succeeds Act Maintenance of Effort form, Form ESMOE, must be provided. PASSED

IC-ADMIN-PLANT-SVCS - (W) - Percentage of plant services costs attributable to general administration should not be zero or exceed 25%. PASSED

IC-PCT - (W) - The straight indirect cost percentage before the carry-forward adjustment (Form ICR, Part III, Line C) is between 2% and 9%. PASSED

IC-POSITIVE - (W) - The indirect cost rate after the carry-forward adjustment (Form ICR, Part III, Line D) should be positive. PASSED

IC-ADMIN-NOT-ZERO - (W) - Other General Administration costs (Part III, Line A1) in Form ICR should not be zero. PASSED

IC-BD-SUPT-NOT-ZERO - (W) - Board and Superintendent costs (Part III, Line B7) in Form ICR should not be zero. PASSED

IC-BD-SUPT-VS-ADMIN - (W) - In Form ICR, the ratio of Board and Superintendent costs (Part III, Line B7) to Other General Administration costs (Part III, Line A1) should not be less than 5%. PASSED

IC-EXCEEDS-LEA-RATE - (W) - The indirect cost rate used in one or more programs (Form ICR, Exhibit A - Rate Used) should not exceed the LEA's approved indirect cost rate. PASSED

PCRAF-UNDISTRIBUTED - (F) - Allocation factors must be entered in Form PCRAF for support functions with costs in undistributed goals (goals 0000 and 9000). PASSED

PCR-ALLOC-NO-DIRECT - (W) - In forms PCR/PCRAF, costs should normally only be allocated to goals that have direct costs. PASSED

PCR-GF-EXPENDITURES - (F) - Total Costs by Program in Form PCR, Column 6 should agree with total expenditures (objects 1000-7999) in funds 01, 09, and 62. PASSED

ASSET-ACCUM-DEPR-NEG - (F) - In Form ASSET, accumulated depreciation and amortization for governmental and business-type activities must be zero or negative. PASSED

ASSET-PY-BAL - (F) - If capital asset ending balances were included in the prior year unaudited actuals, the Schedule of Capital Assets (Form ASSET) must be provided. PASSED

DEBT-ACTIVITY - (O) - If long-term debt exists, there should be activity entered in the Schedule of Long-Term Liabilities (Form DEBT) for each type of debt. PASSED

DEBT-POSITIVE - (F) - In Form DEBT, long-term liability ending balances must be positive. PASSED

DEBT-PY-BAL - (F) - If long-term liability ending balances were included in the prior year unaudited actuals data, the Schedule of Long-Term Liabilities (Form DEBT) must be provided. PASSED

EXPORT CHECKS

UNAUDIT-CERT-PROVIDE - (F) - Unaudited Actual Certification (Form CA) must be provided. PASSED

ICR-PROVIDE - (F) - Indirect Cost Rate Worksheet (Form ICR) must be provided. PASSED

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.

SACS2022ALL Financial Reporting Software - 2022.2.0
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Unaudited Actuals
 2022-23 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 3307, 3309, 3312, 3318, and 3332. PASSED

GENERAL LEDGER CHECKS

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

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

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

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

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

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

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

INTRAxFD-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	9010	-75,466.77
Explanation:Special ed began the year with a negative ending balance due to a liability owed for special ed revenue.		
Total of negative resource balances for Fund 62		-75,466.77

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

FUND	RESOURCE	OBJECT	VALUE
62	9010	9790	-75,466.77
Explanation:Special ed began the year with a negative ending balance due to a liability owed for special ed revenue.			

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

2022-2023 Budget Update

Section: VII. Finance
Item: B. 2022-2023 Budget Update
Purpose: FYI
Submitted by:
Related Material: 2022-23 Budget Update Materials.pdf

2022-2023 REVISED BUDGET

AUGUST 23, 2022

Key Changes included in the Governor's Enacted Budget

LCFF Funding Increase

ADA Funding Methodology

Discretionary Block Grant (Arts, Music & Instructional Materials Block Grant)

Learning Recovery Emergency Block Grant

Increased SpEd Funding

Governor's Budget vs. May Revision vs. Enacted Budget

Item	Governor's Budget	May Revision	Enacted Budget	Impact to PCHS vs Adopted Budget
LCFF Funding Increase	\$3.3 billion	\$6.1 billion	\$8.9 billion ¹	~12.8% COLA Approx. \$898,098
Discretionary Block Grant Funding	\$0	\$8 billion	\$3.6 billion ²	Estimated \$1,851,395
Learning Recovery Emergency Block Grant	\$0	\$0	\$7.9 billion	Estimated \$1,845,300
ADA COVID Mitigation	\$0	\$0	TBD	Estimated \$738,138

¹Reflects an increase of \$772 million in funding for districts and charter schools, \$2.82 billion for declining enrollment protections, \$997 million to support TK expansion and TK adult-to-student ratios, and a \$4.32 billion base increase

²Arts, Music, and Instructional Materials Discretionary Block Grant

2022-23 LCFF Funding Factors

Grade Span	K-3	4-6	7-8	9-12
2021-22 Base Grant per ADA ¹	\$8,093	\$8,215	\$8,458	\$9,802
6.56% COLA	\$531	\$539	\$555	\$643
Additional LCFF Investment of 6.28% ²	\$508	\$516	\$531	\$616
2022-23 Base Grant per ADA	\$9,132	\$9,270	\$9,544	\$11,061
GSA	\$950	–	–	\$288
2022-23 Adjusted Base Grant per ADA	\$10,082	\$9,270	\$9,544	\$11,349
20% Supplemental Grant per ADA (Multiplied by Total UPP)	\$2,016	\$1,854	\$1,909	\$2,270
65% Concentration Grant per ADA (Multiplied by UPP Above 55%)	\$6,553	\$6,026	\$6,204	\$7,377

¹Average daily attendance

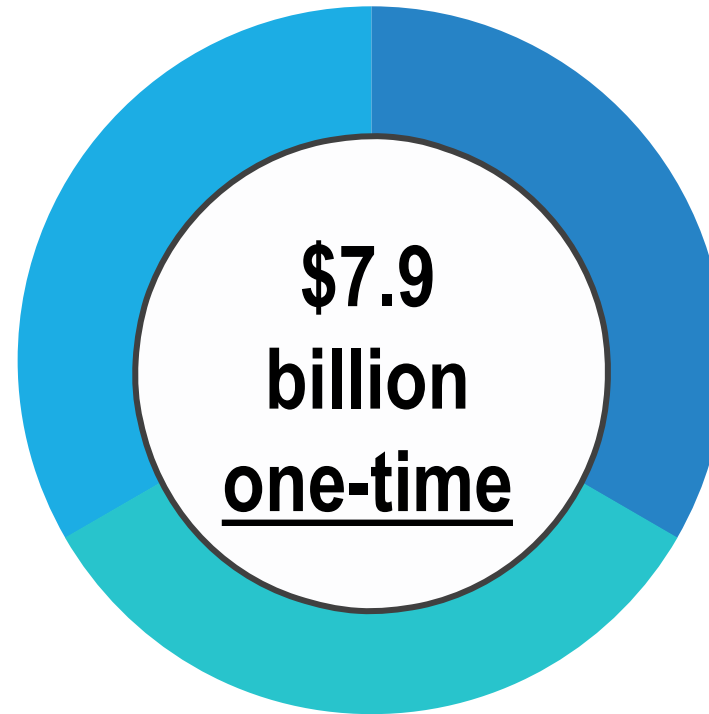
²Applied to 2021-22 base grants

Learning Recovery Emergency Block Grant

Assist school districts, county offices of education, and charter schools with long-term recovery from the COVID-19 pandemic

Distribution

Funds allocated based on 2021-22
Second Principal Apportionment
ADA multiplied by 2021-22 UPP



Reporting

- Must report interim expenditures to CDE by December 1, 2024, and December 1, 2027
- Must submit a final report on expenditures by December 1, 2029

PCHS estimated allocation: \$1,845,300
Note, this is just an estimate!

Deadline

Funds may be used through
2027-28 school year

Learning Recovery Emergency Block Grant—Allowable Uses



Arts, Music, and Instructional Materials Discretionary Block Grant

Distribution

Intend to distribute on a per-pupil basis using 2021-22 Second Principal Apportionment ADA

Plan

Governing board must discuss and approve plan for expenditure of funds at regularly scheduled public meeting

Deadline

Encumber through the 2025-26 school year

PCHS estimated allocation: \$1,851,395
Note, this is just an estimate!

Arts, Music, and Instructional Materials Discretionary Block Grant

Allowable Uses

Instructional materials and professional development aligned to best practices for improving school climate, digital literacy, physical education, and learning through play



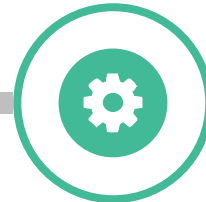
Standards-aligned professional development and instructional materials



Diverse book collections and culturally relevant texts in English, pupils' home languages, or combination of languages



Operational costs



COVID-19 pandemic-related supplies

Key Assumptions used in the 2022-23 PCHS Revised Budget

ADA (Average Daily Attendance): 2,820

- This maintains our prior assumption: enrollment of 3,000 and an attendance rate of 94%.
- However, we will revisit this estimate in 3 weeks, to determine if we need to reduce the enrollment and ADA projections.

Unduplicated Pupil Count: 827

- We are projecting this to remain flat.
- This number impacts our supplemental funding (20% more revenue per unduplicated student)

OPEB Funding: \$790k

- We are funding the amount our actuary recommended. This is year #2 of our 20-year funding schedule.

COLA, Contribution Rates, etc.

- Using the amounts recommended by the Department of Finance for COLA, STRS, PERS, unemployment insurance, Mandate Block Grant, etc.

One-Time Discretionary Funds Excluded

- Not included because final allocation amounts have not been released:
 - Learning Recovery Block Grant: **\$1,845,300**
 - Arts, Music & Instructional Materials Block Grant: **\$1,851,395**
 - Ethnic Studies Block Grant: **\$76,392**
 - Supply Chain Assistance Grant: **\$72,229**
 - One-time COVID ADA Relief for 2021-22: **TBD (approx. \$738,138)**

2022-23 Revised Budget: Topline Summary

	2021-2022 Estimated Actuals 5/22/22	2021-2022 Unaudited Actuals	2022-2023 Adopted Draft Budget 6/6/22	2022-2023 Revised Budget 8/22/22	Difference Revised vs Adopted Budget
Total Revenues	39,676,164	39,809,033	41,627,952	43,282,895	1,654,943
Total Expenses	39,309,876	37,788,897	40,446,619	42,939,740	2,493,121
Net Balance (Financial Statement)	366,288	2,020,136	1,181,333	343,155	(838,178)

A few notes:

Revenue: The Governor's final budget was incorporated into this revised budget. The revenue increased because of the increased COLA amount(s) and revised Special Ed funding rates.

Expenses: Now includes the impact of UTLA bargaining: 7% increase (\$945k) and 7% off-schedule (\$1.06M), as well as slight increases consulting, textbooks, IMA. This does not include any PESPU or unrepresented salary schedule changes.

Immediate Next Steps

- Review enrollment and ADA numbers – critical during the first few weeks of school!
- Once final allocations are available, work with committees and educational partners to solicit feedback for expenditure plans
- Include the impact of PESPU/unrepresented collective bargaining into the budget
- Monitor key expenses:
 - Transportation
 - Data/network/EdTech consultants
 - Substitutes and staffing
 - Relief funds, grants and other sources of one-time funds
- Finance to provide updated 5-year projections: textbook adoption cycle, furniture purchase cycle, Tech expenses
- Recruit and onboard new Finance Director
- Compliance:
 - Work with (1) independent auditor to complete the 2021-22 audit and (2) actuary consultant to complete the actuarial valuation
 - Submit CONAPP for Sept meetings

Palisades Charter High School - 2022-2023 Revised Budget (8/22/22) vs Adopted Budget (6/6/22)

ADA	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2022-2023 Revised Budget 8/22/2022			Difference	Comments	
			Obj Code	Total	5/22/2022	Unrestricted	Restricted	Total			Unrestricted
A. Revenues											\$ 11,641.00
LCFF/Revenue Limit Sources											-
State Aid	8011	15,104,903	12,355,682	15,555,226		15,555,226	24,649,755		24,649,755	9,094,529	2820 ADA (based on enrollment of 3,000 and 94% attendance rate)
Education Protection Act State Aid (Prior Years)	8012 8019	6,777,237 -	8,465,010	8,577,654		8,577,654	9,076,890		9,076,890	499,236	2820 ADA (based on enrollment of 3,000 and 94% attendance rate)
In Lieu of Propety Tax	8096	8,980,282	8,695,667	8,695,667		8,695,667			-	(8,695,667)	2820 ADA (based on enrollment of 3,000 and 94% attendance rate)
Total, LCFF/Revenue Limit Resources		30,862,422	29,516,359	32,828,547	-	32,828,547	33,726,645		33,726,645	898,098	Includes revised LCFF calculator with Governor's COLA
Federal Revenues											
Special Education - IDEA	8181	777,041	751,228		802,782	802,782		734,667	734,667	(68,115)	\$244.62/ADA per LAUSD SELPA (06/22) - DOWN from \$267.30/ADA in 2021-22
Child Nutrition - Federal	8220	345,000	535,000		475,000	475,000		475,000	475,000	-	
Other Federal		-									
Title I	8290	316,871	282,238		300,583	300,583		300,583	300,583	-	revised amount per CDE, 12/31/21
Title II	8290	59,607	56,052		59,695	59,695		59,695	59,695	-	
Title III - English Learners	8290	3,606	3,861		4,112	4,112		4,112	4,112	-	
Title III - Immigrant	8290	3,621									
Title IV	8290	24,214	21,761		23,175	23,175		23,175	23,175	-	
Perkins	8290	35,337	35,337		37,634	37,634		37,634	37,634	-	
Dept of Rehab	8290	10,170	10,000		10,000	10,000		10,000	10,000	-	
Child Nutrition - Supply Chain	8220										
ELC COVID Testing Award	8290		472,831								
ESSR I (COVID-19 Grant)	8290	-	23								
ESSR II (COVID-19 Grant)	8290	-	985,065								
ESSR III (COVID-19 Grant)	8290	-	221,390		947,833	947,833		947,833	947,833	-	
Learning Loss & Mitigation (GEER)	8290	107,643	107,643								
Total, Federal Resources		1,683,109	3,482,429	-	2,660,815	2,660,815		2,592,700	(68,115)		
Other State Revenues											
Child Nutrition - State	8520	20,000	40,000		36,890	36,890		36,890	36,890	-	higher reimbursement due to free meals
Mandated Cost Reimbursement	8550	139,071	139,084	143,764		143,764	143,764		143,764	-	\$50.98/ADA
State Lottery (Non Prop 20)	8560	436,050	458,100	459,660		459,660	479,400		479,400	19,740	higher per ADA rate (\$170.00/ADA)
State Lottery (Prop 20)	8560	142,443	182,678		183,300	183,300		188,940	188,940	5,640	higher per ADA rate (\$67.00/ADA)
CTE	8590	164,827	242,836		270,374	270,374		270,374	270,374	-	
Student ID/CAHSEE	8590	12,073	10,000	10,000		10,000	10,000		10,000	-	
In-Person Instruction Grant	8590	470,566	547,287								Per CDE 8/19/21- \$915,651 allocation, spent \$368K in 20/21
Expanded Learning Opportunities Grant	8590	2,051,780	1,025,890								first allocation received in 20/21, part of beginning balance
Child Nutrition - Kitchen Infrastructure Upgrade	8590		27,000								
A-G Completion Grant	8590				645,524	645,524		645,524	645,524	-	Expanding A-G courses
Educator Effectiveness	8590		50,000		375,181	375,181		375,181	375,181	-	Received Dec 2021- revenue to recognize as expenses are spent
Arts, Music & Instructional Materials Block Grant											PCHS estimated allocation is \$1,851,395 (as of 8/2/22)

Palisades Charter High School - 2022-2023 Revised Budget (8/22/22) vs Adopted Budget (6/6/22)

ADA	2820	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2022-2023 Revised Budget 8/22/2022			Difference	Comments
				Total	5/22/2022	Unrestricted	Restricted	Total	Unrestricted		
Obj Code		Total	5/22/2022	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Revised vs Adopted	
Learning Recovery Emergency Block Grant											
Total, State Revenues		3,436,809	2,722,875	613,424	1,511,269	2,124,693	633,164	1,516,909	2,150,073	25,380	PCHS estimated allocation is \$1,8445,300 (as of 8/2/22)
Other Local Revenues											
Special Education - AB602	8311	2,002,632	2,126,933		2,272,897	2,272,897		2,939,390	2,939,390	666,492	\$978.72 per LAUSD SELPA (6/22) - up from \$756.80 in 2
Food Service Sales	8634	240,000	80,000		90,000	90,000		90,000	90,000	-	Estimating lower a la carte sales due to free breakfast/lunch
Leases & Rentals	8560	1,046,000	1,046,000	1,021,000		1,021,000	1,021,000		1,021,000	-	
Interest	8660	129,549	60,000	80,000		80,000	80,000		80,000	-	
LAUSD SpEd Option 3 Grant	8679	100,000	126,568		100,000	100,000		100,000	100,000	-	higher receipt from SELPA
Fundraising	8699	450,000	525,000	450,000		450,000	450,000		450,000	-	
LAUSD SpEd Option 3 Learning Recovery Grant											
Total, Other Local Revenues		3,968,181	3,964,501	1,551,000	2,462,897	4,013,897	1,551,000	3,262,477	4,813,477	799,580	
Total Revenues		39,950,522	39,686,164	34,992,971	6,634,982	41,627,952	35,910,809	4,779,386	43,282,895	1,654,943	
B. Expenditures											
Certificated Salaries											
Teachers' Salaries-Full-Time	1110	13,282,106	13,199,284	11,569,469	1,700,134	13,269,603	11,569,469	1,700,134	13,269,603	-	22-23 includes 0.25% adjustment to base salary (per union agreement)
Teachers Salaries-Librarian	1130	141,176	135,685	139,024		139,024	139,024		139,024	-	
Teachers' Salaries-Substitute	1160	238,941	568,735	320,000		320,000	320,000		320,000	-	For 22-23, the sub salaries were reduced
Cert Pupil Supp Sal-Counselors	1210	817,927	933,528	942,528		942,528	942,528		942,528	-	Includes additional hours for counseling staff
Cert Administrators	1310	918,695	973,000	909,644	143,142	1,052,786	909,644	143,142	1,052,786	-	2022-23 Cert Admin salaries now includes a Certificated HR Director.
Other Support/Step& Column Impact	1330	119,633		122,624		122,624	122,624		122,624	-	
Auxiliaries/Periods/Net	1930	-				-			-	-	Approximately \$770k of auxiliaries are included in FT Certificated Salaries
FTEs Increase/Decrease		130,360		(37,000)		(37,000)	(37,000)		(37,000)	-	
Impact of Tentative UTLA Agreement		-				-	945,728		945,728	945,728	Impact of 7% salary schedule increase for UTLA (certificated)
Certificated Off-Schedule Pay		7,000				-	1,069,956		1,069,956	1,069,956	7% off-schedule payment, additional increases for competition stipends & Virtual Academy
ESSER II/III funded certificated time						-			-	-	
ELO Related Certificated Time	1110	589,952			336,000	336,000		336,000	336,000	-	Estimated additional PD expense for 2022-23 (ELO)
Total, Certificated Salaries		16,245,790	15,810,233	13,966,289	2,179,276	16,145,565	15,981,972	2,179,276	18,161,248	2,015,684	
Classified Salaries											
Instruct Aide	2110	944,412	855,410		946,773	946,773		946,773	946,773	-	2021-22 was lower due to leaves of absence. FTEs are expected to return in 2022-23
Maint/Operations	2210	114,902	184,544	144,544		144,544	144,544		144,544	-	
Classified Administrators	2310	416,609	323,036	295,790		295,790	295,790		295,790	-	Shifted HR Director from Classified Admin to Certificated Admin Salaries
Cler Tech Office Staff Sal-FT	2410	1,935,059	1,963,500	1,939,897		1,939,897	1,939,897		1,939,897	-	
Food Services	2430	48,397	56,602		52,781	52,781		52,781	52,781	-	Includes additional hours for summer: free/reduced outreach, orientation & Universal meal implementation
Cler Tech Off Staff Sal-Sub	2460	34,817	67,000	75,000		75,000	85,000		85,000	10,000	Accounts for 2 clerical subs per day (6 hrs) - attendance/absenteeism outreach. Added \$10k for library textbook support & distribution.

Palisades Charter High School - 2022-2023 Revised Budget (8/22/22) vs Adopted Budget (6/6/22)

ADA	2820	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2022-2023 Revised Budget 8/22/2022			Difference	Comments	
		Obj Code	Total	5/22/2022	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total		Revised vs Adopted
		2920	975,966	1,049,021	951,644	100,000	1,051,644	951,644	100,000	1,051,644	-	
		2920	166,212	229,490	230,063		230,063	230,639		230,639	575	
			110,000		(108,085)		(108,085)	(108,085)		(108,085)	-	Reduction of 4 Paraprofessionals (SpEd aid) due to categorical funds being exhausted in 21-22. Also, 1 Sr. Office Assistant role is not being backfilled.
			7,000				-			-	-	
			-				-			-	-	
		2920	436,400				-			-	-	
			5,189,774	4,728,604	3,528,853	1,099,554	4,628,407	3,539,428	1,099,554	4,638,982	10,575	
Total, Classified Salaries												
Employee Benefits												
		3111	2,748,788	2,675,091	2,667,561	416,242	3,083,803	3,052,557	416,242	3,468,798	384,996	STRS Employer contribution rate increases from 16.92% (2021-22) to 19.1% (2022-23)
		3212	1,188,977	1,083,323	895,270	278,957	1,174,227	897,953	278,957	1,176,910	2,683	PERS employer contribution rate increases from 22.91% (2021-22) to 25.37% (2022-23)
		3311	-	23,220	23,278		23,278	23,278		23,278	-	
		3312	321,766	293,173	218,789	68,172	286,961	219,445	68,172	287,617	656	
		3331	235,564	229,248	202,511	31,600	234,111	231,739	31,600	263,338	29,227	
		3332	75,252	68,565	51,168	15,944	67,112	51,322	15,944	67,265	153	
		3411	2,538,722	2,361,424	2,280,484	258,238	2,538,722	2,280,484	258,238	2,538,722	-	Rate increase of 5.9%, also accounted for fewer FTE eligible for benefits
		3412	1,269,575	1,156,130	940,575	329,000	1,269,575	940,575	329,000	1,269,575	-	Rate increase of 5.9%, also accounted for fewer FTE eligible for benefits
		3511	200,163	79,051	69,831	10,896	80,728	79,910	10,896	90,806	10,078	Rate maintains at 0.50% by state of CA (compared to 0.05% in 2019-2020)
		3512	64,363	23,643	17,644	5,498	23,142	17,697	5,498	23,195	53	Rate maintains at 0.50% by state of CA (compared to 0.05% in 2019-2020)
		3611	158,737	158,737	174,611		174,611	174,611		174,611	-	Tentative increase of 10% for 2022-23 (compared to 20%+ increase in 2021-22)
		3612	68,030	68,030	74,833		74,833	74,833		74,833	-	Tentative increase of 10% for 2022-23 (compared to 20%+ increase in 2021-22)
		3911	553,000	553,000	553,000		553,000	553,000		553,000	-	must fund at this level per actuary & LAUSD recommendation
		3912	237,000	237,000	237,000		237,000	237,000		237,000	-	must fund at this level per actuary & LAUSD recommendation
			9,659,937	9,009,636	8,406,556	1,414,546	9,821,102	8,834,402	1,414,546	10,248,948	427,846	
Total, Employee Benefits												
Supplies												
		4100	42,112	28,248		403,286	403,286		405,887	405,887	2,601	Textbooks are partially funded via A-G completion grant. A 2nd set of AP Psych books was included, added \$2,600.74 to textbook amount and exhausted "Master Scheduling changes" textbook allocation
		4300	266,834	280,000		276,346	276,346		282,761	282,761	6,415	Added \$6,415 - ceramics IMA was overlooked during budget adoption
		4300	148,827	178,998		270,374	270,374		270,374	270,374	-	CTE Expenses
		4350	86,800	96,000	116,350	11,700	128,050	116,350	11,700	128,050	-	
		4390	24,300	52,764	48,000	7,000	55,000	48,000	7,000	55,000	-	
		4400	576,500	1,148,192	718,701		718,701	718,701		718,701	-	removed \$450K student devices - pending tech plan
		4700	235,041	252,869		219,977	219,977		219,977	219,977	-	

Palisades Charter High School - 2022-2023 Revised Budget (8/22/22) vs Adopted Budget (6/6/22)

ADA	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2022-2023 Revised Budget 8/22/2022			Difference	Comments	
			2021-2022	Unrestricted	Restricted	Total	Unrestricted	Restricted			Total
2820	Obj Code	Total	5/22/2022	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Revised vs Adopted	
		1,380,414	2,037,070	883,051	1,188,683	2,071,734	883,051	1,197,698	2,080,749	9,016	
Services											
Mileage & Car Allowances	5210	2,000	2,617	4,000		4,000	4,000		4,000	-	reduced mileage
Travel and Conferences	5220	80,000	44,550	20,000	180,000	200,000	20,000	180,000	200,000	-	Educator Effectivness funded PD
Dues and Memberships/Subscriptions	5310	560,461	431,039	524,706	24,148	548,854	524,706	24,148	548,854	-	\$50k accellus increase recognized next year 22/23
Insurance	5400	397,016	397,016	436,718		436,718	436,718		436,718	-	Tentative increase of 10% for 2022-23 (compared to 20%+ increase in 2021-22)
Operations & Housekeeping Supplies	5510	147,600	153,692	178,475	5,000	183,475	178,475	5,000	183,475	-	
Utilities	5520	426,000	430,000	430,000		430,000	430,000		430,000	-	
Rentals/Leases/Repairs	5610	398,752	388,791	371,673	6,000	377,673	371,673	6,000	377,673	-	
Transportation	5811/ 5812	510,962	577,576	302,900	147,100	450,000	302,900	147,100	450,000	-	Board approved transportation allocation of \$450k for 2022-23. As of 8/22/22, SpEd transportation rates have increased but we will wait until Sept to revise transportation amount.
Oth Contracted Services	5800	35,826	34,784	37,062		37,062	37,062		37,062	-	
STRS Int & Penalties	5803	1,200	1,200	1,200		1,200	1,200		1,200	-	
Contracted Services	5810	2,783,944	3,259,787	1,412,947	1,670,197	3,083,144	1,442,947	1,670,197	3,113,144	30,000	Added \$30,000 for potential contracts to back-fill employees (Director of Attendance, Finance Director, Communications specialist, etc.
Legal, Audit, & Election Costs	5821	330,863	402,516	197,944	223,000	420,944	197,944	223,000	420,944	-	2022-23 increase attributed to Special Education legal/settlements. 2021-22 estimated actuals also exceeded budgeted amount for the same reason.
Advertisement	5831	1,500	1,300	1,500		1,500	1,500		1,500	-	
Computer/Technlgy Related Serv	5840	86,784	17,450	18,000		18,000	18,000		18,000	-	reduction in internet costs
Conslt/Ind Contractors(NonEmp)	5850	20,000	77,337	56,000		56,000	56,000		56,000	-	athletic trainer
Fingrprt,Phys, XRY&Oth Emp Cst	5860	7,500	13,696	15,000		15,000	15,000		15,000	-	Hiring costs significantly exceeded prior years - higher staff turnover (FTEs & contractors) resulted in more background clearances/checks, etc.
Other Services	5890	112,755	137,759	112,227	15,000	127,227	112,227	15,000	127,227	-	
Communications Services	5910	76,000	66,276	76,000		76,000	76,000		76,000	-	
Total, Services		5,979,164	6,437,385	4,196,351	2,270,445	6,466,796	4,226,351	2,270,445	6,496,796	30,000	
Capitlay Outlay											
Sites & Improvement	6100										
Buildings & Improvement	6200	97,950	225,000	559,440		559,440	559,440		559,440	-	revised CAPEX #
Equipment & Technology	6400	10,000	343,930	131,175		131,175	131,175		131,175	-	
Equipment/Furniture Replacement	6500	-				-				-	
Total, Capitlay Outlay		107,950	568,930	690,615	-	690,615	690,615	-	690,615	-	
Depreciation Expense (Financial Reporting Basis)	6900	915,000	980,000	980,000		980,000	980,000		980,000	-	
Other Outgo											
Indirect Cost (LAUSD)	7299	308,624	295,164	328,285		328,285	328,285		328,285	-	
Interest	7438	11,784	11,784	4,731		4,731	4,731		4,731	-	
Total, Other Outgo		320,408	306,948	333,016	-	333,016	333,016	-	333,016	-	

ADA	2820	2021-2022 Adopted Budget (Full Return, B/F Recommended), 6/11/21	2021-2022 Estimated Actuals	2022-2023 Adopted Budget, Recommended by B/F 6/6/2022			2022-2023 Revised Budget 8/22/2022			Difference	Comments
				Obj Code	Total	5/22/2022	Unrestricted	Restricted	Total		

Coversheet

2022-2023 Datalink Networks Contract

Section: VII. Finance
Item: C. 2022-2023 Datalink Networks Contract
Purpose: Vote
Submitted by:
Related Material: PCHS - Datalink - SIS - Ed -Tech Agreement.pdf



Datalink Networks, Inc.
28110 Avenue Stanford, Unit A
Santa Clarita, CA 91355
www.datalinknetworks.net

877-IT-SERVE (M-F 8a-5p)
866-597-9653 (After Hours)

DATALINK NETWORKS, INC. MANAGED SERVICES AGREEMENT

Prepared for: Palisades Charter High School



Date: August 01, 2022
Client Sponsor: Juan Pablo Herrera

I have read and understand the contents of this page:

Client Initials
Page 1 of 18



**DATALINK NETWORKS, INC.
MANAGED SERVICES AGREEMENT
PALISADES CHARTER HIGH SCHOOL**

This Managed Services Agreement (Agreement) is made and entered into as of August 01, 2022 by and between the following parties: Datalink Networks, Inc. (Datalink Networks), having its place of business at 28110 Avenue Stanford Unit A, Santa Clarita, CA 91355 and Palisades Charter High School (Client) having its place of business at 15777 Bowdoin St, Pacific Palisades, CA 90272.

BACKGROUND

This Agreement governs Palisades Charter High School’s engagement of Datalink Networks, Inc. to provide certain K-12 Education Consulting Services and Managed IT Services. The General Terms and Conditions comprising the body of this Agreement set forth the general terms of such appointment. The services and rates, to be provided by Datalink Networks, Inc., are detailed in exhibits attached to this Agreement.

AGREEMENT DOCUMENTS

The parties agree to be bound by this Agreement, which consists of this Signature Page, the General Terms and Conditions, and the exhibits indicated below:

- Exhibit A – Description of SIS/ED-TECH Services
- Exhibit B – Detail of Estimated Monthly Costs
- Exhibit C – Term, Termination and MSP SLA
- Exhibit D – Datalink Networks Rate Chart
- Exhibit E – Datalink Networks SIS-LMS Support Team
- Exhibit F – SIS and Ed-Tech Help Desk Services / Endpoint Help Desk Services

The duly authorized representatives of each of the parties have executed and delivered this Agreement as of the Effective Date.

Datalink Networks, Inc.

Palisades Charter High School

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

I have read and understand the contents of this page:

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**DATALINK NETWORKS, INC.
GENERAL TERMS AND CONDITIONS**

1. TIMING AND LOCATION OF SERVICES

Datalink Networks will perform Services described in Exhibit A of this Agreement. Any professional services work may be performed at either at Client offices or Datalink Networks offices.

2. CONTRACT RETAINER/PAYMENT TERMS

Datalink Networks will submit a monthly retainer invoice to Client for services to be delivered each month. Contract retainer payments are due to Datalink Networks on or before the first day of the month in which the services and/or labor are to be performed.

Datalink Networks will provide a contract statement at the end of each month for services performed. The contract statement shall include each contract resource, total hours worked during the month, billing rate and retainer balance. Any positive balance(s) will be carried forward and be applied to the next month retainer invoice. Any negative retainer balance(s) will be billed to Client and Client agrees to pay within 20 days of invoice date, in accordance with Payment Terms stated herein.

All other purchases, including monthly retainer overages, are due to Datalink Networks 20 days from invoice date. Purchases and/or projects more than \$10,000 require 50% deposit. Datalink Networks has the right, in its sole and absolute discretion, to suspend Services upon failure to remit payment within 30 days of billing, until payment is brought current. Any fees associated with the collection of payment will be the sole responsibility of the Client. Datalink Networks, Inc. reserves the right to withhold the provision of goods and/or services, to assess interest charges at the lesser of 1.5% per month (18% APR), or the maximum allowed by law, and to rescind all discounts granted on goods and/or services, in the event of Client failure to abide by the payment terms stated herein. Should any portion of an invoice be under dispute, Client is obligated to pay the undisputed amount in accordance with stated payment terms. This document supersedes any other written or oral agreement between the parties.

Notwithstanding Section 15 of this Agreement, the Standard Hourly and Discounted Rates, reflected in Exhibit D, are subject to change upon notice by Datalink Networks, at the sole and absolute discretion of Datalink Networks, and shall take effect upon the effective date reflected in the notice.

I have read and understand the contents of this page:

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3. CONFIDENTIALITY

a. **Treatment of Confidential Information** Each party to this Agreement hereby acknowledges and agrees that, in connection with this Agreement, each party will receive, prepare, create, use, observe, possess, control, or otherwise acquire certain confidential information. Each party to this Agreement hereby agrees (i) to maintain all such confidential information in strict confidence (ii) not to, whether directly or indirectly, reveal, report, publish or disclose any such confidential information to any person, firm or other entity not expressly authorized by the other party to this Agreement, in writing, to receive such confidential information, and (iii) not to use, whether directly or indirectly, any such confidential information in any way other than for the purposes of this Agreement.

b. **Enforcement by Injunction**

Each party to this Agreement hereby acknowledges and agrees that the subject matter of this Agreement and all Confidential Information are unique, that the services of Datalink Networks embodied in Datalink Networks' methods and techniques and Datalink Networks' list of Clients, customers and other contacts constitute trade secrets and are valuable assets of Datalink Networks, that the Client's services, methods, techniques, and customer information constitute trade secrets and valuable assets of the Client, and that any violation of this Section 3 would cause irreparable injury to either party and that monetary damages would not provide an adequate remedy to such party. Therefore, each party to this Agreement hereby agrees that if it breaches, or threatens to commit a breach of, any of the restrictive provisions of this Section 3, the other party will have the following rights and remedies, each of which will be independent of the other and severally enforceable, and all of which will be in addition to, and not in lieu of, any other rights and remedies available to such party, whether at law, in equity, pursuant to this Agreement or otherwise:

(1) The right and remedy to have each of the restrictive provisions set forth in this Section 3 specifically enforced by any arbitrator or court having equity jurisdiction, all without the need to post a bond or any other security or to prove any amount of actual damage or that money damages would not provide an adequate remedy; and

(2) The right and remedy to require such party to this Agreement (i) to account for and pay over to the other party all compensation, profits, monies, accruals, increments or other benefits derived or received by such party to this Agreement or any other party deriving such benefits (whether directly or indirectly) as a result of any such breach or threatened breach of the foregoing; and (ii) for a period of two years following the termination of this Agreement, to indemnify the other party, its managers, members, officers, employees, agents, attorneys, successors and assigns

I have read and understand the contents of this page:

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against any other losses, damages (including special and consequential damages), costs and expenses, including reasonable attorneys' fees and court costs, which may be incurred by it and which result from or arise out of any such breach or threatened breach of the foregoing.

4. OWNERSHIP OF WORK PRODUCT

It is the express intention of the parties that Client shall at all times be and shall remain the sole and exclusive owner of all rights of any kind whatsoever in and to any deliverables, material and any other results and proceeds of Datalink Networks' Services hereunder (all of the foregoing may hereinafter be referred to as the "material"), if any, except with respect to Datalink Networks' proprietary technology. Datalink Networks agrees that all material and all other results and proceeds of its Services and those of its employees, consultants, and subcontractors and each aspect thereof is, to the extent possible under law, a "work made for hire" (as defined in the United States Copyright Act of 1976 or other applicable laws). Accordingly, Client shall be considered the author of the material for all purposes and shall be and remain at all stages of completion, the sole and exclusive owner of the material and all right, title, and interest therein.

5. REPRESENTATIONS, WARRANTIES AND COVENANTS

The parties and their respective agents, employees, representatives, contractors, and subcontractors, if any, warrant, represent, and covenant that during the pendency of this Agreement and for two years thereafter they shall not either directly or indirectly use any proprietary, confidential, or trade secret information of the other party, except as required for the purposes of this Agreement. The parties and their respective agents, employees, representatives, contractors, and subcontractors, if any, further warrant, represent, and covenant that during the pendency of this Agreement and for two years thereafter they shall not solicit, call upon, hire, retain or otherwise induce any of the other party's employees, agents, representatives, contractors, subcontractors, or vendors to cease their employment or other relationship with the other party or become employed or otherwise retained or hired by the first party or anyone acting on its behalf.

6. TRAVEL EXPENSE

Normal travel charges apply for onsite visits as shown in Datalink Networks Rate Chart, Exhibit D. Client shall also pay any additional travel expenses, including, but not limited to, airfare, lodging, car rental and meals, when such travel is deemed necessary by Datalink Networks to fully service Client in accordance with this Agreement, and is approved by Client.

7. SUPPORT SERVICES

Certain work during this contract may require Client to provide Datalink Networks onsite office space, telephone, and network access. necessary for Datalink Networks to perform Services described in Exhibit A of this Agreement. Datalink Networks and Client will agree on space and support services to be provided at the beginning of the

I have read and understand the contents of this page:

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contract term, or as the need arises.

8. RELATIONSHIP OF PARTIES

It is understood by the parties that Datalink Networks personnel are independent contractor(s) with respect to Client and are not employees of Client. Client will not provide fringe benefits, including, but not limited to, health insurance benefits, paid vacation, workers compensation insurance, or any other employee benefit, to Datalink Networks personnel.

9. INJURIES

Datalink Networks acknowledges its obligation to obtain appropriate insurance coverage for the benefit of Datalink Networks personnel. Datalink Networks waives any rights to recovery from any injuries that Datalink Networks personnel and representatives may sustain while performing Services under this Agreement that are a result of the negligence of Datalink Networks personnel.

10. INDEMNIFICATION

Each party agrees to indemnify and hold the other party and its directors, officers, employees, agents, affiliates, successors, and assigns harmless from and against all claims, damages, losses, expenses, liabilities, deficiencies, actions, judgments, settlements, interest, awards, penalties, fines, costs, or fees (including actual professional and attorney's fees) arising out of, related to, or resulting from any negligent or more culpable act or omission, with each party's standard of due care being the standard required of a qualified professional in their respective industry.

11. HIRING FEE

Should Client desire to employ or contract directly with Datalink Networks personnel (personnel defined as a current or former employee, representative or independent contractor of Datalink Networks, within the past 12 months), either during or at the conclusion of this Agreement, Client shall pay a hiring fee to Datalink Networks equal to one hundred twenty-five percent (125%) of that person's current annual compensation. This hiring fee shall remain in effect for two years after termination or cancellation.

12. ATTORNEYS FEES

In the event of any dispute arising out of this Agreement, the prevailing party shall be entitled to recover its actual attorney fees and costs incurred in connection with the dispute.

13. INSURANCE COVERAGE

Datalink Networks Inc. shall maintain, at Datalink Networks Inc. own expense, all insurance reasonably required in connection with this Agreement or any SOW, including but not limited to, workers compensation, commercial general liability, cybersecurity, and comprehensive umbrella with policy limits, as applicable, not less

I have read and understand the contents of this page:

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than \$1,000,000 per occurrence and \$2,000,000 in the aggregate. All the insurance policies described herein will not be canceled, materially changed or renewal refused.

14. VENUE

The venue for any dispute between the parties shall be with the Los Angeles County Superior Court, North Valley District.

15. ASSIGNMENT

Neither party shall assign this Agreement or delegate any duties hereunder without the express prior written consent of the parties.

16. MODIFICATION OR AMENDMENT

With exception to Exhibit D, as indicated in Section 2 of this Agreement, no modification or amendment to this Agreement shall be effective unless in writing and signed by all parties to this Agreement.

17. INJUNCTIVE RELIEF

The parties shall be entitled to injunctive or other extraordinary relief in this Agreement to prevent any party from violating the Confidentiality (Section 3) and/or Hiring (Sections 5 and 11) provisions of this Agreement.

18. GOVERNING LAW

This Agreement and each party's performance and actions shall be governed, interpreted, and construed according to California law.

19. FORCE MAJEURE

No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement when and to the extent such failure or delay is caused by or results from acts beyond the impacted party's control, including, without limitation: acts of God, flood, fire, wildfire, earthquake, natural disaster, explosion, war, unrest, riot, peaceful protest, invasion, hostilities, terrorist threats or acts, government order or actions, national or regional emergency, strikes, labor stoppages or interruption of public utilities. The impacted party shall give notice immediately of the force majeure event to the other party stating the period of time the occurrence is expected to continue. The impacted party shall use all reasonable efforts to end the failure or delay and ensure the effects of the force majeure event are minimized. The impacted party shall resume the performance of its obligations as soon as reasonably practicable after the removal of the cause. For clarity and avoidance of doubt, acts of cyberwarfare, cyberterrorism, hacking, malware, cyberattack, or other virus-related incidents that circumvent any protocols in place to prevent such incidents are not force majeure events.

I have read and understand the contents of this page:

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20. SEVERABILITY

If one or more of the provisions of this Agreement is invalid, illegal, or unenforceable, said illegality, invalidity or unenforceability shall not affect the remainder of this Agreement.

21. COUNTERPARTS

This Agreement may be signed in counterparts and by facsimile. An electronic or facsimile signature shall be deemed an original.

22. ENTIRE AGREEMENT

This Agreement, which consists of the Signature Page, the General Terms and Conditions, and the exhibits indicated on the Signature Page, contains the entire Agreement of the parties, and there are no other promises or conditions in any other agreement, whether oral or written. This Agreement supersedes any prior written or oral agreements between the parties.

I have read and understand the contents of this page:

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EXHIBIT A
DESCRIPTION OF SIS – ED-TECH SERVICES
PALISADES CHARTER HIGH SCHOOL

During the pendency of this Agreement, Datalink Networks will provide the following labor coverage for all engineering support listed below (collectively, Services). Datalink Networks requires Client to maintain and provide Datalink Networks with copies of signed manufacturer maintenance contracts for all hardware covered under this Agreement.

SIS AND LMS CONSULTING SERVICES

- Provide discovery and assessment services of current SIS and LMS Systems
- Lead programmer and analysts to create standard and customized reports
- Integrate SIS and LMS Systems to create data transfers between systems
- Deliver reporting and presentations to PCHS Sr. Leadership and School Board of findings recommendations, staffing, and programs
- Lead PCHS specialists in administration of the SIS and LMS systems and training of the campus community
- Deliver SIS Reports to school administration and faculty
- Assist in the Integration and dataflow of SIS and LMS Systems
- Provide Help Desk Support to administrators and faculty for SIS and LMS Systems

ED-TECH AND CTE CONSULTING SERVICES

- Provide Needs Assessment review of school education programs
- Make recommendations and plans to address both short- and long-term Ed-Tech goals
- Develop calendar and action plan to meet school goals
- Provide support for operational reporting the following areas: facility usage, lockers, security, campus access, asset inventory, device tracking
- Plan school funding strategies, and provide leadership and training to staff members on finding and receiving grant awards
- Identify 1:1 Program goals and objectives, and advise PCHS student device program
- Provide Help Desk Support Services for PCHS IT Department

I have read and understand the contents of this page:

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EXCLUSIONS: SERVICES DO NOT INCLUDE

- The cost of any manufacturer license support for SIS/ LMS Platform
- The cost of direct manufacture support of SIS /LMS Platform
- Products and services to bring SIS or LMS environment up to minimum standards require
- The cost of any parts, equipment, or shipping charges of any kind
- The cost of any software, licensing, or software renewal or upgrade fees of any kind
- The cost of any third-party vendor or manufacturer support, product replacement services, or incident fees of any kind
- Products and services to bring end user’s environment up to minimum standards required for services
- Failure due to acts of God, building modifications, power failures, cloud service failures or other adverse conditions or factors

DATALINK NETWORKS 24x7x4 CONTRACT MANAGEMENT INCLUDES:

On an ongoing basis, Datalink Networks’ Account Managers will review with Client the following:

- Monthly Review of SIS-LMS and Ed Tech Service Delivery
- Invoicing or billing issues
- Upcoming project(s) support requirements

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EXHIBIT B
DETAIL OF ESTIMATED MONTHLY COSTS
PALISADES CHARTER HIGH SCHOOL

Monthly Contract Retainer Client will pay a monthly retainer in the amount of \$26,000.00 for Semester #1 and \$22,750.00 for Semester #2, plus: One-Time Costs below, any negative monthly retainer balances, Help Desk Services consumed and the cost of monitoring for Services as detailed in Exhibit A of this Agreement.

All payment will be made to Datalink Networks in accordance with the payment terms specified in Section 2 of this Agreement. Datalink Networks will invoice Client for all charges applicable to this Agreement. Any additional time provided during the month will be billed to Client at the Discounted Hourly Rates reflected in Exhibit D. Notwithstanding Section 15 of this Agreement, the Standard Hourly and Discounted Rates, reflected in Exhibit D, are subject to change upon notice by Datalink Networks, at the sole and absolute discretion of Datalink Networks, and shall take effect upon the effective date reflected in the notice.

One Time Costs

Assessment and Reporting Services

	Description	Estimated Cost
Deliverable #1	Infinite Campus and Schoology Integration and Support Technical Support for SIS and LMS integration and Management Sr. Consultant <ul style="list-style-type: none"> • Discovery and Assessment Report /Initial Technical Evaluation • Est. 80 hrs. @ 150.00/hr (SIS and LMS) • Due Sept 2022 	\$ 12,000.00
Deliverable #2	Ed-Tech Program Review and Strategic Plan <ul style="list-style-type: none"> • Assessment and Milestones • Program Design and Recommendations • Calendar • Staffing and Budget • Est 50 hrs @ 150.00/hr 	\$ 7,500.00
Total One Time Costs		\$ 19,500.00

I have read and understand the contents of this page:

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Monthly Contract Service Fees

	Description	Monthly Retainer
Deliverable # 1A	SIS – LMS Reporting Systems Sr. Design Consultant <ul style="list-style-type: none"> • Provide Strategic Leadership • Infinite Campus-Schoology Program Integration • Report alignment with School Requirements • Staff Systems Training 	
Semester #1	<ul style="list-style-type: none"> • Semester #1 – Est 15 hrs/wk @ 150.00/hr (20 weeks) 	\$ 9,750.00 (S1)
Semester #2	<ul style="list-style-type: none"> • Semester #2 – Est 10 hrs/wk @ 150.00/hr (20 weeks) 	\$ 6,500.00 (S2)
Deliverable # 1B	SIS – LMS Reporting Systems Sr. Operations Consultant <ul style="list-style-type: none"> • Provide ongoing technical services to support Infinite Campus-Schoology Systems • Help Desk Support • Plant Operations • Ed-Tech Integration • Reporting and System Maintenance Support 	
Semester #1	<ul style="list-style-type: none"> • Semester #1 – Est 40 hrs/wk @75.00/hr (20 weeks) 	\$13,000.00 (S1)
Semester #2	<ul style="list-style-type: none"> • Semester #2 – Est 40 hrs/wk @75.00/hr (20 weeks) 	\$13,000.00 (S2)
Deliverable # 2	Ed Tech Sr. Operations Consultant <ul style="list-style-type: none"> • Provide On Going Ed Tech Program Support • Program Design • Program Assessment • Staff Training • Grant Consulting 	
Semester #1	<ul style="list-style-type: none"> • Semester #1 – Est 5 hrs/wk @ 150.00/hr (20 weeks) 	\$ 3,250.00 (S1)
Semester #2	<ul style="list-style-type: none"> • Semester #2 – Est 5 hrs/wk @ 150.00/hr (20 weeks) 	\$ 3,250.00 (S2)
Total Monthly Retainer	Semester #1 Semester #2	\$26,000.00 (S1) \$22,750.00 (S2)

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**EXHIBIT C
CONTRACT TERM, TERMINATION AND SLA
PALISADES CHARTER HIGH SCHOOL**

TERM/TERMINATION

The term of this Agreement shall be for 11 months commencing on August 01, 2022 and ending on June 30, 2023. This Agreement shall automatically renew each year, for an additional year, if Client does not submit a written cancellation notice a minimum of 30 days prior to contract expiration.

EARLY TERMINATION

Client shall have at its option the ability to terminate this contract early if Datalink Networks is not providing Services as outlined herein. Client may cancel this contract with 30 days written notice to Datalink Networks. Datalink Networks shall have at its option the ability to terminate this contract early with 90 days written notice to Client.

SUPPORT SERVICE LEVEL AGREEMENT (SLA)

Datalink Networks operates a 24x7 Helpdesk that is staffed with a Professional Service Manager. We receive requests through email or phone request to our service department. Datalink Networks provides the following service level guarantees to Client for Priority 1 and Priority 2 issues:

- **Remote service (phone/data response) within one-hour 24x7x1**
- **On-Site service within four-hours 24x7x4**

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EXHIBIT D DATALINK NETWORKS RATE CHART PALISADES CHARTER HIGH SCHOOL

Revised 4/1/2022 Please call the Datalink Networks' Service Department at 877-487-3783 for the most timely response. This number is for

Service Level	Description of Work	Day of Week	Hours (Pacific Time)	Standard Hourly Rate	Discounted Hourly Rate
Level 3 Engineering Service	Systems planning integration and troubleshooting, cloud and Data-Center architecture and design. Unified communications design, advanced networking, fire wall and security installations and troubleshooting.	Regular Hours Monday - Saturday	8:00am - 7:00pm	280.00	250.00
		After Hours Night/Sun/Holiday	7:00pm - 8:00am	420.00	250.00
Level 2 Engineering Service	Server, storage, basic networking and cloud computing installation and troubleshooting services. System and network documentation. Project management.	Regular Hours Monday - Saturday	8:00am - 7:00pm	235.00	210.00
		After Hours Night/Sun/Holiday	7:00pm - 8:00am	352.50	210.00
Level 1 Engineering Service	Scheduled endpoint/shared devices services, including desktop, laptop and printer set up, PC imaging, printer, desk phone, etc. Incidental , unscheduled, endpoint troubleshooting in the absence of a Help Desk Service Agreement, or outside of regular Help Desk Service Hours.	Regular Hours Monday - Saturday	8:00am - 7:00pm	117.00	84.00
		After Hours Night/Sun/Holiday	7:00pm - 8:00am	175.50	84.00
Help Desk Service (If included herein)	Troubleshooting and remediation of specified Client users and their MONITORED endpoint/client devices, including laptops, mobile phones, desktops and tablets, and MONITORED shared devices such as printers, scanners, fax machines and desk phones.	Regular Hours Monday - Friday	6:00am - 6:00pm	N/A	84.00
		After Hours Night/Weekend/Holiday	N/A	N/A	N/A

Onsite Services	Remote Services
<p>A four-hour minimum charge, plus travel charge, per incident, applies to onsite work performed during regular hours.</p> <p>A four-hour minimum charge, plus travel charge, plus \$500 emergency fee, per incident, applies to onsite work performed after hours. Emergency fee is waived with current, annual service contract.</p> <p>Changes or cancellations to any onsite visit must be made a minimum of two business days prior to the visit. Changes or cancellations to onsite visits made less than two business days prior may incur a \$500 cancellation fee, subject to the discretion of Datalink Networks' management.</p> <p>Discounted Hourly Rates above applied to engineering and technical services provided under a current, annual Managed Services Agreement during the specified time periods specified above. Otherwise, Standard Hourly Rates apply.</p> <p>Travel is charged at \$195 per visit within Los Angeles County and \$225 per visit outside of Los Angeles County.</p> <p>Should client desire to employ or contract directly with Datalink Networks personnel (personnel defined as a current or former employee, representative or independent contractor of Datalink Networks, within the past 12 months), either during or at the conclusion of this Agreement, client shall pay a hiring fee to Datalink Networks equal to one hundred twenty-five percent (125%) of that person's current annual compensation. This hiring fee shall remain in effect for two years after termination or cancellation.</p> <p>This rate chart must be signed and dated by the Client. Datalink Networks' terms of payment for all professional services are "Net 20 Days". Customer agrees to pay Datalink Networks within these terms. Any fees associated with the collection of payment will be the sole responsibility of the Client. Datalink Networks, Inc. reserves the right to withhold the provision of goods and services, and to assess interest charges at the lesser of 1.5% per month (18% APR), or the maximum amount allowed by law, in the event of client failure to abide by the payment terms stated. Failure to remit payment within the above stated terms will result in the forfeiture of any and all discounts granted. This document supersedes any other written or oral agreements between the parties. The Standard Hourly and Discounted Rates reflected here are subject to change upon notice by Datalink Networks, at the sole and absolute discretion of Datalink Networks, and shall take effect upon the effective date reflected in the notice.</p>	<p>A half-hour minimum charge per incident applies for remote service and phone support performed during regular hours.</p> <p>A two-hour minimum charge, plus \$500 emergency fee, per incident, applies for remote service and phone support performed after hours. Emergency fee is waived with current, annual service contract.</p>
<p>Name: _____</p> <p>Title: _____</p> <p>Company: _____</p>	<p>Signature: _____</p> <p>Date: _____</p>

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EXHIBIT E
IT SUPPORT REQUEST PROCEDURE
DATALINK NETWORKS SIS /LMS /ED-TECH SUPPORT TEAM
PALISADES CHARTER HIGH SCHOOL

Support Requests

(Pacific Time)

Regular Business Hours

(Monday – Friday 8am-5pm, Excluding Holidays)

Sandra Rodriguez, Professional Services Manager

661-294-8825

srodriguez@datalinknetworks.net

After Hours Emergency Support

(Monday – Friday 5pm-8am, Saturday – Sunday 24 hours, Holidays)

866- 597-9653 – After Hours Line

877- 487-3783 – Main Customer Number

Datalink Networks SIS and ED-TECH Support Team

Ed-Tech Program Manager - Lindsey Surendranath

lsurendranath@datalinknetworks.net

SIS -LMS Program Manager - Patrick Mount

pmount@datalinknetworks.net

Account Manager – Brian Wisdom

661-705-8395

brianw@datalinknetworks.net

Account Manager – Colby Norwood

661-705-8395

cnorwood@datalinknetworks.net

Professional Services Manager – Sandra Rodriguez

661-294-8825

srodriguez@datalinknetworks.net

Accounting and Billing – Michael Montemayor

661-294-8836

michaelm@datalinknetworks.net

I have read and understand the contents of this page:

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**EXHIBIT F
MONTHLY HELP DESK SERVICES
INCLUDED IN THIS AGREEMENT
PALISADES CHARTER HIGH SCHOOL**

GENERAL TERMS AND CONDITIONS

All Terms and Conditions in Sections 1-22 of this Agreement are applicable to Help Desk Services.

HELP DESK SERVICES – INFINITE CAMPUS AND SCHOOLGY

Help Desk Services are defined as direct support of Client’s specified users and the access and useability of Infinite Campus SIS services, and Schoology LMS services. Rates for Help Desk support for these two platforms are as published above in Exhibit B.

HELP DESK SERVICES – ENDPOINT DEVICES

All endpoint/client devices, including laptops, mobile phones, desktops, and tablets, as well as shared devices such as printers, scanners, fax machines and desk phones. Users covered under this Help Desk Services Option must be specified by name and listed herein. Endpoint and shared devices covered under Help Desk Services **MUST** be monitored as described in Exhibits A and B of this Agreement. Covered users and devices may be updated by Client as necessary.

Help Desk Services include troubleshooting and remediation of these endpoint and shared devices. Help Desk Services **DO NOT** include any services that can be scheduled, such as device maintenance, patching, imaging, set up of new devices, etc. Any necessary/requested services such as these will be billed as additional support under Client’s MSP Agreement.

IN-SCOPE HELP DESK SERVICES (INCLUDED)

- Support devices running current Microsoft Windows 10 or 11 OS and current Apple OS's
- Open a ticket with business application vendors and ISP services
Note End user must provide contact information
- Workstation/laptop support
- Network connectivity Support – Single User
- Business line application support – to be provided by client
- Outlook or email client issues – send receive
- Office 365 issues
- Printer-related issues (mapping, drivers, and connectivity)
- Server based Password resets – Level I MSP
- Malware report on single PC or Laptop
- Root Cause Analysis of OS or business software issues
- New user creation and password resets:
 - New user creation in A/D (up to 24 hours)
 - Password Resets for employees or management contact
 - Create corresponding email account within Exchange or O365 system

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- Create and configure email filtering services
- Mobile Device Support: Active Sync (email only)
- Active directory user or email user deletion
- Active directory user adds

OUT-OF-SCOPE HELP DESK SERVICES (ESCALATED, NOT INCLUDED)

MSP Level 1 Services

- Installation, repair, virus scan, etc. of multiple devices
- Operating system installs, upgrades, reimaging, etc.
- Setup of new devices or peripherals (PCs, laptops, printers, etc.)

MSP Level 2 Services

- Restoring backup files
- Configuring backup devices
- Troubleshooting applications and/or devices not on supported list
- Administrative tasks, network audits, security assessments, etc.
- Server triage, troubleshooting, configuration, etc.
- Modifications of file permissions, group policies, etc.
- Network infrastructure configuration/reconfiguration
- O365/M365 tenant configuration, troubleshooting, etc.
- Data transfers, migrations, etc.
- Azure tenant configuration, troubleshooting, etc.
- Cloud telephony system configuration, troubleshooting, etc.
- Email security configuration, troubleshooting, etc.

MSP Level 3 Services

- Security troubleshooting, firewall installation, firewall troubleshooting, etc.
- Enterprise cloud design, incl server, storage, network, security, etc.
- UCaaS design and planning
- Security policy design and testing
- Integration of On-Premises/Cloud authentication systems
- Enterprise network infrastructure design, implementation, etc.
- Enterprise datacenter design, implementation, etc.

CLIENT TICKET CREATION

Datalink Networks Helpdesk Services will create tickets for all phone calls and emails received by the client on same day, within Helpdesk Services Hours.

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ESCALATION PRIORITIES AND PROCEDURES

- Priority 1: Phone call made to the Datalink Networks dedicated Help Desk line advising of urgent ticket escalation
- Priority 2 General email for ticket with request for escalation
- Priority 3: General ticket for scheduled work

HELP DESK SERVICES BILLING AND PAYMENT

All payment will be made to Datalink Networks in accordance with the payment terms specified in Section 2 of this Agreement. Datalink Networks will invoice Client on a monthly basis for Help Desk Services provided. Help Desk Services will be billed to Client at the Discounted Hourly Rates reflected in Exhibit D of this Agreement. Notwithstanding Section 15 of this Agreement, the Standard Hourly and Discounted Rates, reflected in Exhibit D, are subject to change upon notice by Datalink Networks, at the sole and absolute discretion of Datalink Networks, and shall take effect upon the effective date reflected in the notice.

TERM, TERMINATION

The Help Desk Services Agreement Term/Termination and Early Termination is specified in Exhibit C of this Agreement.

HELP DESK SERVICES COVERAGE

Help Desk Services provide user support to specified Client end users for covered and monitored devices from 6:00am to 6:00pm Pacific Time, Monday-Friday, excluding Datalink Networks company holidays. During these hours, Help Desk Service requests, submitted in accordance with the Help Desk Request Procedure detailed below, will receive a response within 30 minutes.

I have read and understand the contents of this page:

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Coversheet

PESPU Sunshine Proposal

Section: VIII. Palisades Educational Support Personnel United (PESPU) Sunshine Proposal
Item: A. PESPU Sunshine Proposal
Purpose: Vote
Submitted by:
Related Material: PESPU Sunshine Proposal .pdf



PALISADES EDUCATIONAL SUPPORT PERSONNEL UNITED

August 19, 2022

Dr. Pamela Magee
Executive Director/Principal
Palisades Charter High School
15777 Bowdoin St
Pacific Palisades, CA 90272

Re: Sunshine Letter

Dear Dr. Magee,

Consistent with the relevant provisions of the Educational Employment Relations Act (Government Code section 3540 et seq.), including Section 3547 of the Government Code, the Palisades Educational Support Personnel United ("PESPU") sunshines the following initial proposals for successor negotiations with Palisades Charter High School ("PCHS") relating to the parties' collective bargaining agreement ("CBA") that expired on June 30, 2022. Specifically, PESPU will propose modifications relating to the following items under the parties' collective bargaining agreement ("CBA"):

Article 9 – Hours and Overtime

Article 12 - Wages and Salaries, Pay Allowances, Differentials and Special Salary Practices

Article 13 – Health and Welfare

Sincerely,

Taiyana Ballard
Acting President, Palisades Educational Support Employees Union, CTA/NEA

cc: Martha Monahan
Omar Joseph

15777 Bowdoin Street Pacific Palisades, CA 90272 (310) 230-6623

Coversheet

Consideration of Eighth Amendment to Contract for Employment of Executive Director/Principal

Section: IX. Governance
Item: A. Consideration of Eighth Amendment to Contract for Employment of
Executive Director/Principal
Purpose: Vote
Submitted by:
Related Material: Pamela Magee_EDP Employment Contract.pdf



EIGHTH AMENDMENT

**TO CONTRACT FOR EMPLOYMENT OF EXECUTIVE
DIRECTOR/PRINCIPAL BETWEEN PALISADES CHARTER HIGH
SCHOOL AND DR. PAMELA A. MAGEE**

This AMENDMENT is made and entered into this 21st day of June, 2022, by and between the Board of Trustees of Palisades Charter High School ("Board") and Dr. Pamela A.

Magee ("Dr. Magee").

WHEREAS, the Board and Dr. Magee entered into a Contract for employment of Principal & Chief Administrative Officer ("Contract") on June 12, 2011; and

WHEREAS, the Board and Dr. Magee amended the Contract on January 20, 2015 reflecting a four-year term of employment, commencing July 1, 2014 through June 30, 2018; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 28, 2016 reflecting (among other things) an additional one-year term of employment, commencing July 1, 2018 through June 30, 2019; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 19, 2017 reflecting (among other things) an additional one-year term of employment, commencing July 1, 2019 through June 30, 2020; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 19, 2018 reflecting an additional one-year term of employment, commencing July 1, 2020 through June 30, 2021; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 18, 2019 reflecting an additional one-year term of employment, commencing July 1, 2021 through June 30, 2022; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 23, 2020 reflecting (among other things) an additional one-year term of employment, commencing July 1, 2022 through June 30, 2023; and

WHEREAS, the Board and Dr. Magee amended the Contract on June 22, 2021 reflecting (among other things) an additional one-year term of employment, commencing July 1, 2022 through June 30, 2024; and

WHEREAS, the Contract provides that the Board may extend the contract for an additional year upon Dr. Magee receiving a satisfactory performance evaluation by the Board; and

WHEREAS, for the 2021-22 school year, Dr. Magee received an evaluation of "Satisfactory" or "Outstanding" from the Board; and

WHEREAS, the Board wishes to exercise its discretion to extend the Contract for a period of one year for this current evaluation.



NOW THEREFORE it is hereby agreed as follows:

1. All of the foregoing recitals are true and correct.
2. Section 2 of the Contract, entitled Term of Employment, is modified to reflect an additional year through June 30, 2025.
3. All other provisions of the June 12, 2011 Contract, the January 20, 2015 Amendment, the June 28, 2016 Amendment, the June 19, 2017 Amendment, the June 19, 2018 Amendment, the June 18, 2019 Amendment, and the June 23, 2020 Amendment shall remain in full force and effect.

IN WITNESS WHEREOF, we affix our signatures to this Amendment to the Contract for Employment of the Executive Director/Principal, effective June 21, 2022.

FOR THE BOARD OF TRUSTEES OF PALISADES CHARTER HIGH SCHOOL Dara Williams, Chair

Chair _____ 6/24/22 Dr. Pamela A. Magee Dr. Pamela Magee 6/24/22
Evaluation Committee

Signature:

Email:

Coversheet

2021-2022 Annual Performance Based Oversight Visit Report

Section: IX. Governance
Item: E. 2021-2022 Annual Performance Based Oversight Visit Report
Purpose: FYI
Submitted by:
Related Material:
PALIHS 8798 Annual Performance-Based Oversight Visit Report 2021-2022.pdf



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2021-2022 SCHOOL YEAR

FOR

PALISADES CHARTER HIGH (LOC. CODE 8798)

Name and Location Code of Charter School

LAUSD Vision

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

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

* Charter School shall comply in a timely manner with all applicable federal and state laws and regulations, as they may change from time to time, including but not limited to matters related to the school's governance, programs, facilities, operations, and/or fiscal management. Elements of the oversight process may be modified as LAUSD responds to the COVID-19 pandemic. To support the well-being of all at a school site, all are expected to follow applicable COVID-19 public health guidelines, including related District requirements for operations at District facilities. The assigned Specialist will reach out with more details, as needed. Thank you.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22

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 Charter¹:	LAUSD Board District:		LAUSD Local District:		
July 1, 2020 to June 30, 2027	4		West		
Number of Students Currently Enrolled:	Enrollment Capacity Per Charter:	Number Above/Below Enrollment Capacity (day of visit):		54 below enrollment capacity	
2,946	3,000				
Grades Currently Served:	Grades To Be Served Per Charter:	Percent Above/Below Enrollment Capacity (day of visit):		1.8% below enrollment capacity	
9-12	9-12				
Norm Enrollment Number:	2,982				
Total Number of Staff Members:	245	Certificated:	160	Classified:	85
Charter School's Leadership Team Members:	Dr. Pam Magee (Executive Director), Juan Pablo Herrera (Chief Business Officer), Don Parcell (Director of Operations), Monica Iannessa (Director of Academic Achievement), Chris Lee (Director of Admissions, Attendance and Alternative Programs), Tammie Wilson (Director of Student Support Services), Amy Onyendur (Director of Admissions and Attendance), Russell Howard (Director of Discipline, Athletics and Security)				
Charter School's Contact for Special Education:	Tammie Wilson		SELPA & Option:	LAUSD, Option 3	
CSD Assigned Administrator:	Christine Kae		CSD Fiscal Services Manager:	Allan Villamor	
Other School/CSD Team Members:	Erik Elward (Specialist), Imelda Phillips (Specialist)				
Oversight Visit Date(s):	April 8, 2022		Fiscal Review Date (if different):	N/A	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	Yes Sole Occupant Agreement		LAUSD Co-Location Campus(es) (if applicable):	N/A	
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)	N/A		Date of Co-Location meeting with Operations Team:	N/A	
			COO/TCO Approved Grade Levels and Occupancy Loads:	N/A	

SUMMARY OF RATINGS

(4)=Accomplished (3)=Proficient (2)=Developing (1)=Unsatisfactory

Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
4	No Rating	4	2

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/8/22

CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2021-2022*. The "Sources of Evidence" sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/8/22

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

GOVERNANCE	RATING*
Summary of School Performance	4
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> - G1: Governance Structure and Evaluation of School Leader(s) – The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership as evidenced by the Board’s organizational chart, Board member roster, Bylaws amended March 10, 2020, regular board and committee meeting documents, and evaluation of the executive level leadership, administrators, and classified management. The following subcommittees provide the board with ongoing information and updates: (1) Budget and Finance, (2) Post-Retirement Lifetime Benefits, (3) Election, (4) Academic Accountability, (5) Long Term Strategic Planning, (6) Charter, and (7) Grade Appeal. - G2: Brown Act – The Governing Board complies with all material provisions of the Brown Act. Board meetings occur monthly, are conducted openly with teleconferencing via Zoom in compliance with AB 361, and provide opportunity for public participation. The board meeting agendas and minutes are posted and maintained at the school site and the current board agenda is posted on the school’s website. Brown Act training was provided July 24, 2021. - G3: Due Process – 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 as evidenced through a review of the following documents: Parent-Student Handbook, Uniform Complaint Policy (UCP) and forms, stakeholder complaint procedures, and employee handbook. - G4: Responsive and Accountable Governance – The Governing Board regularly considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria). A review of the board minutes shows ongoing consideration of school data and updates, including student and parent reports, staff reports, Human Resources Director, Director of Operations, Director of Development, Chief Business Officer, and Executive Director reports, and various Board committee updates. PCHS Board Member Roles and Responsibilities are outlined to ensure the Board of Trustees acts in the best interest of its stakeholders. <p><u>Areas Noted for Further Growth and/or Improvement</u> None</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22

Corrective Action Required

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

Notes:

None

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22

G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S) - 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 Governing Board seeks input from committees/councils described in the school’s charter including but not limited to those mandated by laws or regulations as applicable (e.g., SSC and ELAC) Evaluation of school’s executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4, such as Executive Director, Area Superintendent, Principal, etc.) 		
	Rubric	Sources of Evidence
Performance	<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 system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter, nor any mandated committees/councils or a system for the evaluation of the school’s executive level leadership 	<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 leadership. (B1.7) <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)

G2: BROWN ACT - 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 are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity Governing Board meetings are held in accordance with the requirements of E.C. 47604.1 		
	Rubric	Sources of Evidence



LAUSD CHARTER SCHOOLS DIVISION

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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 (B1.8a) <input checked="" type="checkbox"/> Compliance with E.C. 47604.1 (B1.8b) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1.9) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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G3: DUE PROCESS - QUALITY INDICATOR #3

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

- Student discipline
- Employee grievances and discipline
- Parent/stakeholder complaint resolution procedure (complaints outside regulatory scope of UCP)
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
Performance	<input 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, for students, employees, parents, and the public	<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> Employee Handbook(s) (B1.10b) <input checked="" type="checkbox"/> Uniform Complaint Procedures policy and form(s) (B1.11) <input checked="" type="checkbox"/> Stakeholder complaint procedures and form(s) (B1.12) <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process (B1.13) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

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DATE OF VISIT: 4/8/22

G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4

The Governing Board has systems in place to ensure ongoing:

- Review and use of academic performance (e.g., CA School Dashboard, internal assessments, etc.) and other school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence
- Monitoring of the school’s implementation of its LCAP and additional school plans, e.g., CSI, SPSA (action plans and progress toward LCAP goals)
- Transparent governance and accountability to stakeholders
- Monitoring of staffing needs and compliance with all applicable credentialing, clearance, and training requirements

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

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DATE OF VISIT: 4/8/22

G5: FISCAL CONDITION - QUALITY INDICATOR #5

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

- The school is fiscally strong and net assets are positive in the prior two independent audit reports.
- If applicable, all LAUSD Board of Education-approved fiscal condition-related benchmark(s) are met by the required deadline(s).

	Rubric	Sources of Evidence
Performance	<p><input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s)</p> <p><input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report*</p> <p><input type="checkbox"/> The school is fiscally weak or unstable**, net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division*</p> <p><input type="checkbox"/> The school is consistently fiscally weak, net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division*</p> <p>*Additional considerations that could influence the rating may include: inadequate cash flow, financial condition and/or enrollment reflecting a downward trend or beginning to show signs that illustrate or contribute to deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years, multi-year reliance on financing resources for the school’s operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.).</p> <p>**For example, the school’s financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years.</p>	<p><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)</p> <p><input checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)</p> <p><input type="checkbox"/> Observation of Governing Board meeting</p> <p><input checked="" type="checkbox"/> Discussion with leadership</p> <p><input checked="" type="checkbox"/> Independent audit report(s)</p> <p><input checked="" type="checkbox"/> Other financial information submitted by the school</p> <p><input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)</p>



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22

G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - QUALITY INDICATOR #6

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

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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school consistently adheres to the Governing Board approved fiscal policies and procedures, does not have any areas noted for improvement, and the two most current annual independent audits show no material weaknesses, deficiencies, and/or findings <input type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement, and the most current annual independent audit shows no material weaknesses, deficiencies, and/or findings <input checked="" type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, or has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, unresolved recurring issues, potential conflicts of interest, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, etc.)	<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input 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) The rating of 2 is primarily due to the deficiencies with the reporting of the school's unduplicated pupil count identified in the school's 2020-2021 independent audit report.

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

N/A



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22

STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance**	No Rating
California Department of Education's (CDE) Charter School's Performance Category	Middle Performing
<p>Does the charter school qualify for technical assistance? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>If yes, what is the school's identification? (See additional information within "Notes" section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u> See **notes below</p> <ul style="list-style-type: none"> - A11: English Learner Reclassification – The school reclassifies English Learners at a rate of 9.7%, which is higher than the state average of 6.9%. The school's At-Risk rate of 1.0% and LTEL rate of 5.6% are lower than the state rates of 10.1% and 17.1%, respectively. <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: **Due to the COVID-19 pandemic, state law suspended the reporting of state indicators on the 2021 Dashboard. Accordingly, no overall score will be issued in the Student Achievement and Educational Performance category for the 2021-2022 Annual Performance-Based Oversight Report. Please note that, although the overall Student Achievement and Educational Performance category is not scored, Indicator <i>A11: English Learner Reclassification</i> is scored based on 2020-2021 reclassification data.</p> <p>Reclassification Criteria: Palisades Charter High adheres to the LAUSD reclassification criteria.</p> <p>Graduation Requirement: Completion of 230 credits and meet A-G requirements.</p>	
<p>*NOTE: A charter school cannot receive a rating in this category greater than a 1 if the school has been identified as Low performing charter school based on the state's published list.</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter High

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/8/22**A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1**

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

- California School Dashboard Schoolwide ELA data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Green; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the ELA Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

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

- California School Dashboard Schoolwide Math data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Green; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the Math Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



LAUSD CHARTER SCHOOLS DIVISION

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DATE OF VISIT: 4/8/22**A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - QUALITY INDICATOR #3**

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

- California School Dashboard Schoolwide ELPI data (CDE)

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

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

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

- California School Dashboard Schoolwide CCI data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard CCI color is Blue <input type="checkbox"/> The schoolwide Dashboard CCI color is Green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard CCI color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard CCI color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the CCI on the Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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DATE OF VISIT: 4/8/22**A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - QUALITY INDICATOR #5**

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>	
<ul style="list-style-type: none"> California School Dashboard Schoolwide Chronic Absenteeism Indicator data (CDE) 	
Rubric	Sources of Evidence
Performance <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is either Red <input type="checkbox"/> Not Available - No color assigned for the Chronic Absenteeism Indicator on the Dashboard <input checked="" type="checkbox"/> Not Applicable - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school 	<ul style="list-style-type: none"> <input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR - QUALITY INDICATOR #6

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



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DATE OF VISIT: 4/8/22**A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR - (GRADES 9-12) - QUALITY INDICATOR #7**

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>	
<ul style="list-style-type: none"> California School Dashboard Schoolwide Graduation Rate Indicator data (CDE) 	
Rubric	Sources of Evidence
Performance <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the Graduation Rate Indicator on the Dashboard <input type="checkbox"/> Not Applicable - Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school 	<ul style="list-style-type: none"> <input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> Provide Graduation Requirements (Additional info within "Notes" section above) (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD SUBGROUP ELA - QUALITY INDICATOR #8

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>	
<ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard ELA (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE) 	
Rubric	Sources of Evidence
Performance <ul style="list-style-type: none"> <input type="checkbox"/> All numerically significant subgroups have "Status/Distance From Standard (DFS)" scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> None of the school's numerically significant subgroups have "Status/DFS" scores above the statewide averages <input checked="" type="checkbox"/> Not Available - No assessment of performance for this indicator 	<ul style="list-style-type: none"> <input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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DATE OF VISIT: 4/8/22**A9: DASHBOARD SUBGROUP MATH - QUALITY INDICATOR #9**

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) on the California School Dashboard Math (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE)

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

A10: DASHBOARD SUBGROUP COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - QUALITY INDICATOR #10

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) on the California School Dashboard CCI (Students with Disabilities, English Learners, and Socioeconomically Disadvantaged, etc.)(CDE)

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



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A11: ENGLISH LEARNER RECLASSIFICATION - QUALITY INDICATOR #11

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

- English Learner reclassification rate for 2020-2021 (CDE)

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



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SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/8/22**A12: VERIFIED DATA - PERFORMANCE QUALITY INDICATOR #12****VERIFIED DATA****For Informational Use (Not Scored at This Time)**

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

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

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

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



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

Verified Data Assessment	Grade Levels Assessed	95% Participation Rate (Met/Not Met)	Frequency of Administration of Verified Data Assessment
1. [Assessment 1 (ELA)]	9-12	<input type="checkbox"/> Met <input checked="" type="checkbox"/> Not Met	Throughout the Spring Semester
2. [Assessment 1 (Math)]	9-12	<input type="checkbox"/> Met <input checked="" type="checkbox"/> Not Met	Throughout the Spring Semester
3. ELPAC	9-12	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Throughout the Spring Semester Testing Window

If the charter school did not meet the 95% participation rate, the charter school provided the following plan to address participation rate as follows:
The school leadership shared that in order to meet 95% participation rate, tests will be given in-person with the exception of the Virtual Academy, which will be proctored using Zoom and the CAASPP testing platform. Three staff will be dedicated to track participation using TOMS dashboards for CAASPP, CAST, IAB's, ELPAC, and the Fitnessgram.

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

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

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

The charter school provided the following description of how the school implemented protocols to ensure the assessment(s) are administered as intended:
Per school leadership, assessments were administered as intended by the test publisher's administration and test security procedures. Adjustments were made during distanced learning periods for proctoring assessments online.

The charter school affirmed that the assessments were administered as intended, consistent with the test's publishers' administration and test security procedures:
 Yes No



LAUSD CHARTER SCHOOLS DIVISION

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

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

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

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

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

Verified Data Notes:

At this time, a school’s submission of verified data will serve for informational purposes only.

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

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. Due to the lack of 2020-2021 California School Dashboard data, there are no updates to the benchmark. CSD will continue to monitor through oversight.



LAUSD CHARTER SCHOOLS DIVISION

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

The CSD reviewed the Local Control Accountability Plan.

All requested template information and descriptions were provided:	Sources of Evidence
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Annual Update for the 2019-202 LCAP Year <input checked="" type="checkbox"/> Annual Update for the 2020-2021 Learning Continuity and Attendance Plan <input checked="" type="checkbox"/> 2021-2024 Plan Summary <input checked="" type="checkbox"/> Stakeholder Engagement <input checked="" type="checkbox"/> Goals and Actions <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students <input checked="" type="checkbox"/> Expenditures Tables 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Local Control Accountability Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)

Notes:

Notice of Concern issued September 24, 2021 regarding Incomplete 2021-2022 Local Control and Accountability Plan (LCAP), an Annual Update for the 2019-2020 LCAP Year, and an Annual Update for the 2020-2021 Learning Continuity and Attendance Plan. The governing board approved the updated LCAP on October 26, 2021.



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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 Plan and Procedures – The school has a highly developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety. The school provided evidence of the following: Sole Occupant Agreement, current School Safety Plan, Visitor Policy with posting at the school site, documentation of student immunization and health screening waiver, posting of evacuation route maps, Automatic External Defibrillators (AED), Student ID card with Lifeline number, and Board-adopted policy on pupil suicide prevention (May 16, 2017). - O2: Health and Safety Training and Preparation – The school has a highly developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety as evidenced by regular emergency drills, including fire, earthquake, active intruder, and shelter-in-place, Epi-pens, and staff trainings in child abuse mandated reporter, bloodborne pathogens, Pupil Suicide Prevention and Awareness, and use of Epi-pens. - O3: Implementation of the Educational Program – The school has fully implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served as evidenced by the following: Standards-based and data-driven instructional program aligned to school’s key features which include the Pali Academy and Virtual Academy’s small learning community providing students with an alternative academic program to meet student needs, the extensive Mental Health program including four full-time staff (mental health counselors and psychologist), Career Technical Education’s six pathways of Business Enterprise, Computer Science, Design, Drama, Music, and Photography, and various student groups. The school leadership identified focus areas were observed throughout the classroom observations: Socio-emotional connection, student-centered engagement, integration of technology, and personalization of learning. - O8: Stakeholder Engagement and Involvement – The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns as evidenced by the use of the school’s website, school marquis, and various messaging platforms, where the charter and other school information is shared, including opportunities to participate in regular committees (including the Long Term Strategic Planning, Budget and Finance), Parent Teacher Student Association, Booster Club, Parent information and orientation meetings, and schoolwide events. - O9: Transparency for Stakeholders – The school has a highly developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website as evidenced by the availability and accessibility of information to the public and stakeholders. The following information was shared manually and accessible on the school’s website: Charter petition, Local Control and Accountability Plan, academic achievement and progress, Uniform Complaint Procedures and forms, Title IX information, financial documents, charter school policies, governing board and council meeting agendas and minutes, access to mental health resources, human trafficking prevention resources, and bullying and harassment prevention information. 	



LAUSD CHARTER SCHOOLS DIVISION

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None

Corrective Action Required

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

Notes:

None

***NOTE:**

- *A charter school cannot receive a rating in this category greater than 1 for any of the following reasons: (1) Failed to complete criminal background clearances for any new staff and/or sole proprietor (as defined on the Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; or (2) Failed to have Health, Safety, and Emergency Plan in place.*
- *A charter school cannot receive a rating in this category greater than 2 for any of the following reasons: (1) Failed to conduct child abuse mandated reporter training in accordance with Education Code 44691; or (2) Any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.*



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

The school has a system in place to ensure:

- A current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- A current site-specific comprehensive Health, Safety, and Emergency Plan is completed
(**Note:** for co-locations, the charter school adheres and complies with the District school’s Integrated Safe School Plan)
- A visitor’s policy is visible in the school's main office and Parent-Student Handbook
- Documentation of student immunizations
- Documentation of health screenings per applicable law and terms of the charter (vision screenings upon school entry and every third year thereafter through grade 8 and hearing screenings are mandated in kindergarten/first grade and in second, fifth, eighth, tenth/eleventh grade and upon first school entry)
- A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), as outlined in Ed. Code, § 215
- Needy students receive one nutritionally adequate free or reduced priced meal each school day, as outlined in Ed. Code, § 47613.5
- For schools offering an interscholastic athletic program, at least one automated external defibrillator (AED) is onsite and available for use, as outlined in Ed. Code, § 35179.4 and 35179.6
- For schools serving grades 7-12, Student ID cards have the phone number of the National Suicide Prevention Lifeline printed on at least one side, as outlined in Ed. Code, § 215.5

Rubric	Sources of Evidence
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DATE OF VISIT: 4/8/22

Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed system in place to ensure the protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a) <input checked="" type="checkbox"/> Student immunization (B3.2b) <input checked="" type="checkbox"/> Health screening (B3.2b) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <input checked="" type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.2f) <input type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1g) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Visitor's Policy (B3.1a) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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LAUSD CHARTER SCHOOLS DIVISION

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O2: HEALTH AND SAFETY TRAINING AND PREPARATION – QUALITY INDICATOR #2

The school has a system in place to ensure:

- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)
- School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting, as outlined in Ed. Code, § 44691
- Maintenance of an emergency epinephrine auto-injector (“epi-pen”) onsite and training has been provided to volunteer staff member(s) in the storage and emergency use of the epi-pen, per applicable laws
- Pupil Suicide Prevention and Awareness Training (as applicable)

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a well-developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.5) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.5) <input checked="" type="checkbox"/> Pupil Suicide Prevention and Awareness Training (B3.1f, g and B3A.5) <input checked="" type="checkbox"/> Epi-pen and training (B3.2c) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022</i> (“ESSA Grid”) (B3A.1) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has fully implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has substantially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has partially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has minimally implemented, or not at all, the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Implementation of an educational program serving all grade levels approved to be served per charter (B3.3i, j, k) <input checked="" type="checkbox"/> California State Content Standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.3c) *new schools only <input checked="" type="checkbox"/> WASC accreditation (B3.3d) <input checked="" type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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



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O5: SPECIAL EDUCATION - QUALITY INDICATOR #5

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

- Provides special education programs and services in accordance with students' IEPs
- Provides special education training for staff
- Conducts a special education self-review annually, using the Special Education Self-Review Checklist
- Maintains timely IEP timeline records and accurate service provision records in Welligent

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input checked="" type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> District Validation Review (DVR) (B3.4a) <input checked="" type="checkbox"/> Self-Review Checklist (B3.4a) <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.4a) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.3i) <input type="checkbox"/> Consultation with Charter Operated Programs office <input type="checkbox"/> Other special education documentation (B3.4a) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> MOU Non-LAUSD SELPA <input type="checkbox"/> Other: (Specify)



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

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

- Align with the principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student subgroups
- Minimize chronic absenteeism for all students and student subgroups
- Procedures for preventing acts of bullying, including cyberbullying, in accordance with the requirements of Ed. Code, § 32283.5 and 234.4

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input 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) (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.4b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention, such as SST/COST (B3.4b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.4b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.4b) <input checked="" type="checkbox"/> Data monitoring (B3.4b) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input type="checkbox"/> Chronic absenteeism rates <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.4b) <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7

The school:			
<ul style="list-style-type: none"> • Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs • Provides faculty and other instructional staff with professional development opportunities to improve instructional practice • Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 			
Rubric			
Sources of Evidence			
Performance	<table border="0"> <tr> <td style="vertical-align: top;"> <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 </td> <td style="vertical-align: top;"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development year-long plan agendas, and sign-ins) (B3.4c) <input checked="" type="checkbox"/> Professional development training materials (B3.4c) <input checked="" type="checkbox"/> System to assess professional development needs (B3.4c) <input type="checkbox"/> Interview of teachers and/or other staff <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table>	<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 year-long plan agendas, and sign-ins) (B3.4c) <input checked="" type="checkbox"/> Professional development training materials (B3.4c) <input checked="" type="checkbox"/> System to assess professional development needs (B3.4c) <input type="checkbox"/> Interview of teachers and/or other staff <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
<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 year-long plan agendas, and sign-ins) (B3.4c) <input checked="" type="checkbox"/> Professional development training materials (B3.4c) <input checked="" type="checkbox"/> System to assess professional development needs (B3.4c) <input type="checkbox"/> Interview of teachers and/or other staff <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)		



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O8: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR #8

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

- Provides parents, teachers, and students with meaningful opportunities for involvement and engagement that meet the requirements and goals of applicable federal and state law, the school’s charter, and the school LCAP
- Implements a School Site Council (SSC) and/or English Learner Advisory Committee (ELAC), in accordance with legal requirements (e.g., member composition of committee/council, legally required topics, etc.), if applicable
- Engages in communication that notifies parents, teachers, pupils and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.4d) <input checked="" type="checkbox"/> Stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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O9: TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

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

- Information is easily accessible to the public and school stakeholders, and is presented in English and applicable languages as required by law
- Applicable categories described in Charter School Transparency Resolution
- UCP and all complaint procedures
- Title IX information in accordance with Ed. Code, § 221.61**
- Suicide Prevention policy in accordance with Ed. Code, § 215**
- Notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year, in accordance with Ed. Code, § 49428
- Ensure that specified information on bullying and harassment prevention is readily accessible in a prominent location on the LEA's existing website in a manner that is easily accessible to parents or guardians of pupils, in accordance with Ed. Code, § 234.1 et seq.**
- Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance
- Identifies and implements the most appropriate methods of informing parents and guardians of pupils in grades 6-12, of human trafficking prevention resources, in accordance with Ed. Code, § 49381
- Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements (**high schools only**)

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

Rubric	Sources of Evidence
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Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a well-developed system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP <input checked="" type="checkbox"/> UCP Procedure and Forms <input checked="" type="checkbox"/> Complaint Procedure and Forms <input checked="" type="checkbox"/> Title IX Information <input checked="" type="checkbox"/> Suicide Prevention and Awareness <input checked="" type="checkbox"/> Financial Audit <input checked="" type="checkbox"/> Student Demographics <input checked="" type="checkbox"/> Student Achievement Information <input checked="" type="checkbox"/> Sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4e) <input checked="" type="checkbox"/> Parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4e) <input checked="" type="checkbox"/> Provision of stakeholder access to school's approved charter (B3.4e) <input checked="" type="checkbox"/> Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.4e) <input checked="" type="checkbox"/> Notification of access to available mental health services (B3.4e) <input checked="" type="checkbox"/> Specified information on bullying and harassment prevention (B3.4e) <input type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements, including:

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

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"/> Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f) <input checked="" type="checkbox"/> Evaluation tool for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

<p><i>The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:</i></p> <ul style="list-style-type: none"> • All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times • Individuals employed in a teaching position during the 2019–20 school year obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code, § 47605.4(a).) • The charter school maintains appropriate assignments and monitoring throughout the year and addresses Exceptions (and makes Determinations, as appropriate) in CalSAAS during the CTC-identified annual window. • Charter school identifies its charter user(s) who participate in CTC trainings as well as those through LACOE and/or LAUSD, and they establish internal processes that address not only the CalSAAS monitoring, but also the accurate submission of CALPADS Codes as they relate to the CalSAAS Determinations. • The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current • The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current • The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform school site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students 	
Rubric	Sources of Evidence



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Performance	<ul style="list-style-type: none"> <input 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 checked="" type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Human Resources policies and procedures regarding ESSA qualifications and credentialing requirements <input type="checkbox"/> CalSAAS detail and summary reports; HR procedures for the CalSAAS; List of CalSAAS users who actively engage in the assignment monitoring process <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a, B3A.3, and B3A.4) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.6) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.7) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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Progress on LAUSD Board of Education Benchmarks and/or MOU related to ORGANIZATIONAL MANAGEMENT (if applicable):



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For the 2020-2025 Charter Term, the LAUSD Board of Education approved renewal with the following benchmark: Evidence of its efforts and outcomes to increase student diversity for its numerically significant subgroup populations, based on official student demographic information. Benchmark is partially met. The school has the following numerically significant subgroups: Asian, Black or African American, English Learner, Latino, Socioeconomically Disadvantaged, Students with Disabilities, Two or More Races and White. The school submitted a plan and has taken the following steps to increase diversity: (1) Lottery following preference order, (2) recruitment efforts focused targeted subgroups with redesigned and more inclusive marketing, (3) tracking subgroup student progress, (4) development of a diversity taskforce, and (5) sustaining an inclusive environment.

School	Enrollment	F/R Meal	GATE	American Indian or Alaska Native	Asian	Black or African American	English Learner	Filipino	Foster Youth	Homeless	Latino	Migrant Education	Native Hawaiian or Pacific Islander	Not Reported	Socioeconomically Disadvantaged	Students with Disabilities	Two or More Races	White
2020-21 Enrollment by Ethnicity and Subgroup	3,087	25.0%	7.1%	0.2%	5.7%	10.3%	1.1%	1.0%	0.1%	0.3%	20.3%	0.0%	0.2%	1.8%	25.9%	8.4%	4.4%	56.1%
2019-20 Enrollment by Ethnicity and Subgroup	3,042	29.6%	7.4%	0.2%	6.3%	10.8%	1.0%	0.9%	0.1%	0.2%	19.6%	0.0%	0.3%	1.6%	30.1%	7.8%	2.7%	57.5%



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: **Palisades Charter High**

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: **4/8/22**

8798	2018-2019					2019-2020					2020-2021				
Palisades Charter High	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents		0	7,331,522	6,260,265	6,774,610		7,995,349	8,097,029	10,277,646	10,907,886		7,818,645	7,969,248	15,241,779	15,895,051
Current Assets		0	8,572,866	8,760,182	8,261,941		10,524,306	10,625,986	16,263,631	16,214,121		16,355,834	16,594,985	18,843,408	19,146,611
Fixed and Other Assets		0	8,222,035	8,202,173	8,201,647		7,731,542	7,731,542	7,785,828	7,785,829		7,761,210	7,761,207	7,265,685	7,265,684
Total Assets		0	16,794,901	16,962,355	16,463,588		18,255,848	18,357,528	24,049,459	23,999,950		24,117,044	24,356,192	26,109,093	26,412,295
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	3,093,572	3,302,151	3,434,353		3,461,667	3,429,774	5,186,424	5,031,079		5,113,738	3,831,950	9,350,046	4,927,422
Other Long Term Liabilities		0	80,849	19,187,939	6,882		19,251,739	1,318,867	24,304,581	4,690,859		24,304,581	25,815,024	21,209,024	97,449
Unfunded OPEB Liabilities/Deferred Inflow		0	18,200,050	0	19,772,327		0	19,170,911	0	21,209,024		0	0	0	14,438,638
Total Liabilities		0	21,374,471	22,490,090	23,213,562		22,713,406	23,919,552	29,491,005	30,930,962		29,418,319	29,646,974	30,559,070	19,463,509
Net Assets			(3,340,940)	(4,579,570)	(5,527,735)		(4,457,558)	(5,562,024)	(5,441,546)	(6,931,012)		(5,301,275)	(5,290,782)	(4,449,977)	6,948,786
Total Revenues	35,081,037	34,902,053	34,944,744	34,822,242	37,634,114	35,629,624	35,700,586	35,783,323	35,380,591	37,432,826	33,662,743	36,385,962	36,143,158	37,585,983	43,719,595
Total Expenditures	35,077,142	34,477,261	34,745,182	35,570,845	39,588,263	34,425,874	34,630,409	34,583,730	34,060,520	37,613,864	33,888,246	36,252,203	35,998,906	35,104,948	29,839,797
Net Income / (Loss)	3,895	424,792	199,562	(748,603)	(1,954,149)	1,203,750	1,070,177	1,199,593	1,320,071	(181,038)	(225,503)	133,759	144,252	2,481,035	13,879,798
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	3,895	424,792	199,562	(748,603)	(1,954,149)	1,203,750	1,070,177	1,199,593	1,320,071	(181,038)	(225,503)	133,759	144,252	2,481,035	13,879,798
Net Assets, Beginning	9,945,692	(3,765,732)	(3,765,732)	(3,765,732)	(4,795,825)	(4,579,570)	(5,527,735)	(5,527,735)	(5,527,735)	(6,749,974)	(5,562,024)	(5,441,546)	(5,441,546)	(5,441,546)	(6,931,012)
Adj. for restatement / Prior Yr Adj	0	0	(1,013,400)	(1,013,400)	0	0	0	(1,233,882)	(1,233,882)	0	0	6,512	6,512	(1,489,466)	0
Net Assets, Beginning, Adjusted	9,945,692	(3,765,732)	(4,779,132)	(4,779,132)	(4,795,825)	(4,579,570)	(5,527,735)	(6,761,617)	(6,761,617)	(6,749,974)	(5,562,024)	(5,435,034)	(5,435,034)	(6,931,012)	(6,931,012)
Net Assets, End	9,949,587	(3,340,940)	(4,579,570)	(5,527,735)	(6,749,974)	(3,375,820)	(4,457,558)	(5,562,024)	(5,441,546)	(6,931,012)	(5,787,527)	(5,301,275)	(5,290,782)	(4,449,977)	6,948,786

8798	Audited Financials					2021-2022				
Palisades Charter High	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	7,184,508	6,774,610	10,907,886	15,895,051	0		11,874,110	12,501,660	0	0
Current Assets	8,493,858	8,261,941	16,214,121	19,146,611	0		16,439,110	17,066,660	0	0
Fixed and Other Assets	8,671,146	8,201,647	7,785,829	7,265,684	0		8,145,605	8,145,605	0	0
Total Assets	17,165,004	16,463,588	23,999,950	26,412,295	0		24,584,715	25,212,265	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	3,416,031	3,434,353	5,031,079	4,927,422	0		9,188,500	4,582,500	0	0
Other Long Term Liabilities	80,848	6,882	4,690,859	97,449	0		21,209,023	14,430,932	0	0
Unfunded OPEB Liabilities/Deferred Inflow	18,463,950	19,772,327	21,209,024	14,438,638	0		0	0	0	0
Total Liabilities	21,960,829	23,213,562	30,930,962	19,463,509	0		30,397,523	19,013,432	0	0
Net Assets	(4,795,825)	(6,749,974)	(6,931,012)	6,948,786	0		(5,812,808)	6,198,833	0	0
Total Revenues	35,556,376	37,634,114	37,432,826	43,719,595	0	39,950,523	40,499,824	40,895,633	0	0
Total Expenditures	37,514,404	39,588,263	37,613,864	29,839,797	0	39,690,488	41,862,655	41,645,587	0	0
Net Income / (Loss)	(1,958,028)	(1,954,149)	(181,038)	13,879,798	0	260,035	(1,362,831)	(749,954)	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	(1,958,028)	(1,954,149)	(181,038)	13,879,798	0	260,035	(1,362,831)	(749,954)	0	0
Net Assets, Beginning	(2,837,797)	(4,795,825)	(6,749,974)	(6,931,012)	0	(5,919,818)	(4,449,977)	(4,449,977)	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	11,398,764	0	0
Net Assets, Beginning, Adjusted	(2,837,797)	(4,795,825)	(6,749,974)	(6,931,012)	0	(5,919,818)	(4,449,977)	6,948,787	0	0
Net Assets, End	(4,795,825)	(6,749,974)	(6,931,012)	6,948,786	0	(5,659,783)	(5,812,808)	6,198,833	0	0



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Palisades Charter HighAnnual Performance-Based Oversight Visit ReportDATE OF VISIT: 4/8/22**FISCAL OPERATIONS****RATING**

You have been assessed by the Fiscal Oversight team and you are receiving the rating of 2, *Developing*.

2

According to the CSD's Fiscal Operations Rubrics, the highest fiscal rating that schools with audit findings reported in the most current independent audit report is a "2." To earn a fiscal rating of a 4, schools must have the two most current audits that show no material weaknesses, deficiencies and/or findings, and no discrepancies cited in the Areas Noted for Further Growth and/or Improvement. Palisades Charter High's independent audit report for the fiscal year ended 2019-2020 reported significant deficiencies pertaining to state compliance relating to the school's nonclassroom-based instruction/independent study. Per the school's 2020-2021 audit report, the school has implemented the corrective action plan. Palisades Charter High's independent audit report for the fiscal year ended 2020-2021 reported an audit finding regarding the reporting of the school's unduplicated pupil count. Please see further details under Areas Noted for Further Growth and/or Improvement below.

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

Palisades Charter High's fiscal condition is positive. According to the 2020-2021 independent audit report, the school had positive net assets of \$6,948,786 and net income of \$13,879,798. The 2021-2022 Second Interim projected positive net assets of \$6,198,832 and a net loss of (\$749,954).

Areas of Demonstrated Strength and/or Progress:

- The school's fiscal condition is positive.

	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Second Interim)
Net Assets ⁶	(\$4,795,825) ¹	(\$6,749,974) ¹	(\$6,931,012) ¹	\$6,948,786 ¹	\$6,198,832
Net Income/Loss ⁶	(\$1,958,028) ^{1,2}	(\$1,954,149) ^{1,3}	(\$181,038) ¹	\$13,879,798 ^{1,4}	(\$749,954) ⁵
Transfers In/Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0



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1 According to Palisades Charter High's independent audit reports, as of June 30, 2018, 2019, 2020, and 2021, the accumulated post-retirement benefit obligation (APBO) was estimated at \$18,463,950, \$19,772,327, \$21,209,024, and \$14,438,638, respectively. 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 school's independent audit reports, the school's accrued OPEB expenses/revenues were \$1,162,652, \$1,234,631, \$1,436,697, and **(\$6,770,386)** for Fiscal Years 2017-2018 through 2020-2021, respectively. See **Item 1** in the **Other Observations** section for further details regarding the school's OPEB Obligation.

2 The net loss reported in Fiscal Year 2017-2018 was primarily attributed to an increase in operational expenses.

3 The net loss reported in Fiscal Year 2018-2019 was primarily attributed to an increase in Special Education expenses.

4 The net income reported in Fiscal Year 2020-2021 was primarily attributed to the forgiveness of the schools Paycheck Protection Program (PPP) loan, the reporting of the state's contribution (on behalf payments) to the charter school's employee STRS accounts, and the recalculation of the long-term OPEB liabilities (Please see **Item 1** in the **Other Observations** section below).

5 The projected net loss reported in the Fiscal Year 2021-2022 Second Interim is primarily attributed to Expanded Learning Opportunities (ELO) grant expenditures reported in FY 2021-2022, whereas the school was required to report the corresponding revenue in the prior year, FY 2020-2021.

Areas Noted for Further Growth and/or Improvement:

1. 2020-2021 Audited Financial Statement Finding:

Per Palisades Charter High's 2020-2021 independent audit report, a finding noted deficiencies with the reporting of the school's unduplicated pupil count. The audit report states:

“FINDING 2021-001: UNDUPLICATED LOCAL CONTROL FUNDING FORMULA PUPIL COUNT (40000)

Criteria: Students designated as Free and Reduced Meal (FRPM) eligible and English Learners (EL), who are not directly certified on the CALPADS 1.18 FRPM/English Learner/Foster Youth – Student List report, must have supporting documentation that indicates the student was eligible for their status. The unduplicated local control funding formula pupil count affects the percentage used as data in calculating Local Control Funding Formula (LCFF) apportionment. Auditors are required to verify compliance with California Education Code Section 42238.02(b)(3)(B) in Section W of the 2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting.

Condition: Based on student designations from the 2020-21 CALPADS 1.18 FRPM/English Learner/Foster Youth –Student List report, we noted one student should have been designated as Reclassified Fluent English Proficient(RFEP) as the student was reclassified from an English Learner in 2018. As a result, the total population excluding directly certified, foster youth, and homeless students, was noted to be in error.

Effect: The Charter is not in compliance with State requirements. A total of one (1) student are ineligible for EL designation.



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SCHOOL NAME: Palisades Charter High

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DATE OF VISIT: 4/8/22**Cause:** Clerical oversight.**Questioned Cost:** \$557 as calculated in the table on the following page using guidance from the California Department of Education (CDE).

Calculating the Cost of LCFF Unduplicated Pupil Count Audit Finding	Data Input and Calculated Fields
Total Adjusted Enrollment from the UPP exhibit as of P-2	9,093
Total Adjusted Unduplicated Pupil Count from the UPP exhibit as of P-2	2,657
Audit Adjustment - Number of Enrollment	-
Audit Adjustment - Number of Unduplicated Pupil Count	(1)
Revised Adjusted Enrollment	9,093
Revised Adjusted Unduplicated Pupil Count	2,656
UPP calculated as of P-2	0.2922
Revised UPP for audit finding	0.2921
Charter Schools Only: Determinative School District Concentration Cap	0.8518
Revised UPP adjusted for Concentration Cap	0.2921
Supplemental and Concentration Grant TK/K-3 ADA	0.00
Supplemental and Concentration Grant 4-6 ADA	0.00
Supplemental and Concentration Grant 7-8 ADA	0.00
Supplemental and Concentration Grant 9-12 ADA	2,907.28
Adjusted Base Grant per TK/K-3 ADA	\$8,503
Adjusted Base Grant per 4-6 ADA	\$7,818
Adjusted Base Grant per 7-8 ADA	\$8,050
Adjusted Base Grant per 9-12 ADA	\$9,572
Supplemental Grant Funding calculated as of P-2	\$1,626,297
Revised Supplemental Grant Funding for audit finding	\$1,625,740
Supplemental Grant Funding audit adjustment	(\$557)
Concentration Grant Funding calculated as of P-2	\$0
Revised Concentration Grant Funding for audit finding	\$0
Concentration Grant Funding audit adjustment	\$0
Total Supplemental and Concentration audit adjustment	(\$557)

Repeat Finding: This is not a repeat finding.



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Recommendation: We recommend reconciling the CALPADS 1.18 FRPM/English Learner/Foster Youth –Student List report with the student information system before submitting to CDE to verify all student designations are correct.

Corrective Action Plan: Palisades Charter High School has a new English Language Coordinator overseeing ELPAC testing. Additional checkpoints have been identified for the English Language Coordinator, Information Services Manager, Database Manager and Assistant Principal. Additionally, the Assistant Principal and Principal will be provided a training refresh on the CALPADS reporting process to provide oversight.”

Palisades Charter High provided the CSD with the following response regarding its specific steps to address the audit finding:
 “The fiscal impact of the question costs is minimal (\$557). However, the school is taking the appropriate steps to ensure accurate student data in the future. We have identified additional touchpoints (quarterly) between the English Learner Coordinator, Information Services Manager, Data Manager, Student Assistant Principal, and Executive Director. The meetings will touch on process review and identifying ways to audit student data for accuracy. Meaning, reconciliation of student information across various systems. In addition, we will ensure that these key individuals participate in the CALPADS training provided by the Los Angeles County Office of Education.”

The CSD will continue to monitor this issue through oversight, including reviewing Palisades Charter High’s 2021-2022 audit report for implementation status.

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, highly preferably no later than 90 days following the school’s receipt of this report. It is the school’s responsibility to provide the CSD its action plans/steps, proof of implementation of the mitigating actions taken by the school, and/or documentation (e.g., governing board meeting agendas and approved board meeting minutes, etc.), as applicable, prior to or during the next Annual Performance-Based Oversight Visit. The CSD will continue to monitor these issues through oversight.

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

1. Other Postemployment Benefits:

Per the school’s 2020-2021 independent audit report, Palisades Charter High has established and maintained a special reserve fund for postemployment benefits with Los Angeles County Office of Education (LACOE), and, as of June 30, 2021, the value of its OPEB funds on deposit with LACOE totaled approximately \$5.4M, which is below the estimated expected retiree payments (mainly the actual pay-as-you-go costs) over the next 10 years (i.e., FY 2021-2022 through FY 2030-2031 timeframe) of approximately \$6M (as per the June 30, 2021 actuarial valuation report for the retiree health program). However, as of the date of this report, the school has yet to establish a trust to hold and invest its OPEB assets. Based on the ASC 715 accounting rules, the OPEB funds on deposit are not being recognized or offset to reduce the OPEB liability on the school’s balance sheet.

The school provided the CSD with the following update regarding the OPEB:



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“The Board of Trustees created an investment committee in order to research, identify, and secure the service of a reputable and experienced third-party administrator to manage the investment of the APBO [accumulated post-retirement benefit obligation] funds. After reviewing multiple RFPs [request for proposal], the investment committee selected an investment manager, approved an investment policy statement (IPS), solicited board approval to transfer funds into the brokerage (for transparency purposes) and then invested the funds.

The next step is to create a trust in order to protect the benefit. The trust was not created at the time of investment because the Lifetime Health Benefit Committee was working with union leadership in exploring ways to (1) expand, (2) maintain, or (3) dissolve/distribute the lifetime health benefit. Given that the trust is irrevocable, we needed additional feedback from employees/committee before initiating. The actuary provided an expanded scope of services and the lifetime health benefit committee determined the benefit should remain as-is.

Our investment manager has recommended a trust attorney who will help us establish the trust in accordance with ASC 715 guidelines. We will also reach out to two (2) other trust administrators to implement the trust. The goal is to bring this to our August 2022 Lifetime Health Benefits committee meeting for approval, then bring it to our [Governing] Board in Sept 2022 for approval.”

The school has advised the CSD that, in January 2022, Palisades Charter High transferred \$5M from LACOE to Merrill Lynch to initiate investing the funds towards the school’s OPEB obligations. As noted above, the school’s accumulated post-retirement benefit obligation is \$14,438,638 as of the actuarial report annual update dated June 30, 2021. This is a decrease of \$6,770,386 (or 32%) from the \$21,209,024 estimate reported on the actuarial report dated June 30, 2021. The significant adjustment is primarily due to an update in the discount rate to 5% from the previous 2.67%. Now that the school has initiated investing funds, the actuarial firm recommended 5%, which was reported in the school’s 2020-2021 audit. Based on the actuary recommendations, the school adopted a 20-year prefunding plan that starts in 2021-2022 with a planned OPEB contribution of \$790,000. Per the school, the 20-year funding schedule, along with investing the funds (5% rate of return) would ensure sustainability of the retiree benefit.

The CSD noted that the school has made strides in addressing and funding of the school’s OPEB obligation and continues to recommend that the school’s governing board direct the school leadership or its investment committee to (1) Research, identify, and secure the service of a reputable and experienced third-party administrator to manage the investment of the APBO funds to legally protect the school employees’ postemployment benefits, with the goal of increasing returns within legal requirements; (2) Request the school’s actuary to complete an annual re-measurement of the pension plan liabilities [pursuant to ASC 715], which shall consider changes in assumptions, plan provisions, and census data, to the extent that failing to account for such changes would materially impact the results; and (3) Request the school’s actuary to perform an actuarial funding analysis, as needed, and make appropriate annual contributions to fund the school’s unfunded OPEB obligations.

The CSD will continue to monitor the school’s progress in establishing a trust for its OPEB obligations. The results may be factored into the school’s rating for next year.

Corrective Action Required:



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

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2021 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: Yes, the 2020-2021 audit report noted deficiencies regarding the reporting of the school's unduplicated pupil count. Please see Areas Noted for Further Growth and/or Improvement above. The school's 2020-2021 independent audit report also indicated that the audit finding regarding deficiencies with pupil master agreements for the school's independent study program cited in the 2019-2020 audit report has been addressed and resolved.
 - d. Lack of Going Concern: None Reported
2. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
3. Governing board meeting minutes reflecting the adoption of the 2021-2022 budget were provided.
4. Evidence of Palisades Charter High's offering STRS, PERS, and Social Security benefits to its employees and proof of payment was provided.
5. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
6. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
7. Per the 2020-2021 audit report, the school's unrestricted ending fund/net asset balance is \$6,033,796 and total expenditures equal \$29,839,797. Therefore, the school's reserve for economic uncertainty as defined in California Code of Regulations (CCR), Title 5, Section 15450 is 20.22%, which exceeds the minimum 3% based on the school's Average Daily Attendance (ADA) of 2,779.37 per the school's 2021-2022 Second Principal Apportionment data reported.
8. Per the 2020-2021 audit report, the school's cash and cash equivalents is \$15,895,051 and total expenditures equal \$29,839,797. Therefore, the school's cash reserve level is 53.27%, which exceeds the recommended 5%.
9. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
10. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
11. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
12. A copy of the charter school's organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member, or school employee, who handle day-to-day finances and/or have responsibilities outlined within the charter school's financial policies and procedures, was provided.
13. An itemized accounting regarding total compensation paid in Fiscal Year 2020-2021 to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
14. The most current accounts payable aging report was provided.
15. Reviewed the following 20 checks. No discrepancies were noted.
 - a. Check numbers (Cathay Bank Checking Account Ending in X6940 – Operating Account): 20208928, 20226099, 20232269, 20238469, 20238471, 20297251, 20314404, 20334555, 20336131, 20337258, 20355030, 20387523, 20401538, 20408264, 20414134, 20439368, and 20442030; (Cathay Bank Checking Account Ending in X6842 – Associated Student Body Account): 14894, 15177, and 15219



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- b. Reviewed 3 credit/(debit) transactions: (Cathay Bank Checking Account Ending in X0440) The transaction description is: (1) 1/21/2022 – \$440.00; (Cathay Bank Checking Account Ending in X6885) The transaction description is: (2) 1/13/2022 – \$7,600.00; (Cathay Bank Checking Account Ending in X6940) The transaction description is: (3) 1/26/2022 – (\$51,884.42)
16. Reviewed credit card statements from August 2021 through January 2022. Selected the months of October 2021 and January 2022 for sample testing. No discrepancies were noted.
- US Bank Credit Card Ending in X3039 (Executive Director/ School Principal)
 - US Bank Credit Card Ending in X4243 (Chief Business Officer)
17. Reviewed bank statements and bank reconciliations from August 2021 through January 2022. Selected the months of December 2021 and January 2022 for sample testing. No discrepancies were noted.
- Cathay Bank Checking Account Ending in X6940 (Operating Account)
 - Cathay Bank Checking Account Ending in X0440 (Transportation Account)
 - Cathay Bank Checking Account Ending in X6850 (Cafeteria Account)
 - Cathay Bank Checking Account Ending in X6842 (Associated Student Body Account)
 - Cathay Bank Checking Account Ending in X6869 (Drama Account)
 - Cathay Bank Checking Account Ending in X6877 (Permit Account)
 - Cathay Bank Checking Account Ending in X6885 (Fundraising Account)
 - Cathay Bank Checking Account Ending in X6893 (Education Fund Account)
 - Cathay Bank Checking Account Ending in X6923 (Pool Account)
 - Cathay Bank Checking Account Ending in X6931 (Payroll Account)
 - Cathay Bank Checking Account Ending in X6958 (Scholarship Account)
18. A Segregation of Duties (SOD) reviews was conducted remotely at Palisades Charter High via videoconference. No discrepancies were noted.
19. Reviewed student body financial records from August 2021 through January 2022. No discrepancies were noted.
20. Equipment inventory was provided.
21. Education Protection Account (EPA) allocation and expenditures pertaining to the prior Fiscal Year (i.e., 2020-2021) are posted on the charter school's website.
22. The most current Audited Financial Statements are posted on the charter school's website.
23. The 2021-2022 Local Control and Accountability Plan was submitted to LAUSD.
24. The most current Local Control and Accountability Plan is posted on the charter school's website.
25. Documentation pertaining to the U.S. Small Business Administration's (SBA) Paycheck Protection Program (PPP) was provided.
26. Documentation pertaining to grants that the school received during both Fiscal Years 2020-2021 and/or 2021-2022 due to the COVID-19 pandemic was provided.
27. Pursuant to AB 1871, a signed and dated 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.
28. Palisades Charter High did not disclose any legal actions, regulatory proceedings, or investigations that might have a material fiscal impact (including financial viability) to the Charter School, and that is currently pending or was filed within the last year or since the last disclosure period, whichever is later.



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29. The 2020-2021 audited and unaudited actuals do not mirror each other. The variance of **(\$4,422,624)** in current liability is primarily due to the recognition of forgiveness of the school's PPP loan. The variance of **(\$21,111,575)** in long-term liabilities is primarily due to the discount rate adjustment utilized in calculating long-term OPEB liabilities by the actuary and auditor, in accordance with ASC 715 and FASB guidelines.
30. The school's reported Norm Enrollment was 3,061, 2,973, 3,031, 3,097, and 2,982 students for Fiscal Years 2017-2018, 2018-2019, 2019-2020, 2020-2021, and 2021-2022, respectively, representing an accumulated decrease in enrollment of 79 (or 3%) students since Fiscal Year 2017-2018. The reported Norm Enrollment of 2,982 students for Fiscal Year 2021-2022 represents a shortfall of 18 students (or 0.6%) from the school's projected enrollment per its roll-out plan and enrollment capacity of 3,000 students in its operative charter. The CSD will continue to monitor the school's student enrollment through oversight.

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

N/A



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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 of 1-4]

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

<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].</i></p>	<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].</i></p>
<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 6. Charter school consistently adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board reviews and approves reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive ; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board reviews and approves reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



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<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p>	<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p>
<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; 19. There are no outstanding fiscal-related tiered intervention notices issued to the school; and 20. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met by the required deadline(s). 	<ol style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner; 16. There are no significant recurring issues; 17. Audited and unaudited actuals nearly mirror each other; and 18. There are no outstanding fiscal-related tiered intervention notices issued to the school.
<p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p>
<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainty as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting. 	<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainty as defined in CCR, Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.



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

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

Existing Schools (based on the most current audit):

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

Existing Schools (based on the most current audit):

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

REQUIRED CRITERIA

1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond);
2. The cash balance at the beginning of the school year is positive;
3. Vendors and staff are paid in a timely manner;
4. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term;
5. Governing board adopts the annual budget;
6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day (pursuant to AB 1871 [Ed. Code § 47613.5]);
7. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school's website;
8. The LCAP is submitted to the appropriate agencies;
9. Have an audit conducted annually by an independent auditing firm; and
10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

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

A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for *Accomplished*, *Proficient*, or *Developing*. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no *feasible* financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to mitigate the negative fiscal condition. The charter school's governing board members and/or leadership lack fiscal capacity.

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

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

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

SUPPLEMENTAL CRITERIA

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



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

<p><i>A new school that meets all of the Required Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>A new school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p><u>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division; 2. The cash balance at the beginning of the school year is positive; 3. If enrollment is significantly below the enrollment per the school’s <i>Pupil Estimates for New or Significantly Expanding Charters</i> report and/or its approved petition budget, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow projections; 4. Projected debt, if any, is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school; 5. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues 	<p><u>New Schools:</u></p> <p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Accomplished</i>, <i>Proficient</i>, or <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school’s operation to mitigate the negative fiscal condition. The charter school’s governing board members and/or leadership lack fiscal capacity.</p> <p>Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.</p>



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

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

6. As a practice, the governing board reviews and approves the charter school's financial reports as evidenced by the governing board meeting minutes;
7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]);
8. The most current governing board-approved LCAP is posted on the charter school's website; and
9. The LCAP is submitted to the appropriate agencies.

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

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

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