



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2022-2023 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 continues to respond to the COVID-19 pandemic. To support the well-being of all at a school site, all are expected to follow applicable COVID-19 public health guidelines, including related District requirements for operations at District facilities. The assigned CSD Administrator will provide any updated information reach out with more details, as needed.



Charter School Name:	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 Region:		
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):		33 below capacity	
2,967	3,000				
Grades Currently Served:	Grades To Be Served Per Charter:	Percent Above/Below Enrollment Capacity (day of visit):		1.1% below capacity	
9-12	9-12				
Norm Enrollment Number:	2,967				
Total Number of Staff Members:	237	Certificated:	163	Classified:	74
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), Amy Onyendu (Director of Admissions and Attendance), Brian Banducci (Director of Discipline, Athletics and Security), Martha Monahan (Director of Human Resources)				
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 (Fiscal Oversight Administrator)	
Other School/CSD Team Members:	Sarah Ziegenhorn (Senior Coordinator), Jose Rodriguez (Specialist)				
Oversight Visit Date(s):	April 27-28, 2023		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		COO/TCO Approved Grade Levels and Occupancy Loads:	N/A	

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

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



CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2022-2023*. The “Sources of Evidence” sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

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



GOVERNANCE	RATING*
Summary of School Performance	4, Accomplished
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <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 evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school’s executive level leadership as evidenced by the Board’s organizational chart, Board member roster, Bylaws, 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) Academic Accountability, (2) Budget and Finance, (3) Election, and (4) Charter. - G2: Brown Act – The Governing Board complies with all material provisions of the Brown Act. Board meetings occur monthly, are conducted openly 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 16, 2022. - G3: Due Process – 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 as evidenced through a review of the following documents: Board meeting agendas and minutes, 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 from various stakeholders, including students, parents, staff, Human Resources Director, Director of Operations, Director of Development, Chief Business Officer, Executive Director, and various Board committees. PCHS Board Member Roles and Responsibilities are outlined to ensure the Board of Trustees acts in the best interest of its stakeholders. The Board received Charter School Governance Training, including the role of the board, Brown Act, Public Records Act, fiduciary duties, and avoiding conflicts of interest in July 2022. <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>	



Notes:
None

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



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

<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 as set forth in the approved charter • Governing Board seeks input from committees/councils described in the school’s charter including but not limited to those mandated by laws or regulations as applicable (e.g., School Site Council and English Learner Advisory Committee) • Evaluation of school’s executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4 of the approved charter, such as Executive Director, Area Superintendent, Principal, etc.) 		
	Rubric	Sources of Evidence
Performance	<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 evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter, nor any mandated committees/councils or a system for the evaluation of the school’s executive level leadership 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Current organizational chart (B1.1a) <input checked="" type="checkbox"/> Organizational chart in Board approved charter (B1.1b) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Committee/council calendars, agendas, roster(s), and sign-ins (B1.6) <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level leadership. (B1.7) <input 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 Ralph M. Brown Act (“Brown Act”) (Gov. Code, §§54950, et seq.) • Governing Board holds its meetings at a location(s) and in a manner that complies with applicable Brown Act requirements and Ed. Code, §47604.1, including but not limited to teleconferencing, closed session, public comment, and Reasonable Accommodations. • The public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as required by applicable Brown Act provisions, Ed. Code, § 47604.1(c)(1)(A) and as described in the approved charter. • Governing Board meeting agendas contain adequate item descriptions and are posted on the school’s website and on campus in accordance with the requirements of the Brown Act. • Governing Board meetings are held in accordance with the Brown Act including the requirements set forth in Ed. Code § 47604.1.
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Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with most material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with some material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with few material provisions of the Brown Act	<input checked="" type="checkbox"/> Board meeting agendas (B1.4) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Brown Act training documentation (B1.8a) <input checked="" type="checkbox"/> Compliance with E.C. 47604.1 (B1.8b) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1.9) <input checked="" type="checkbox"/> School website <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

G3: DUE PROCESS - QUALITY INDICATOR #3

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

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

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



G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4

The Governing Board has systems in place to ensure ongoing:

- Review and use of academic performance data (e.g., CA School Dashboard, internal assessments, etc.) and other school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence
- Monitoring of the school’s implementation of its Local Control and Accountability Plan (LCAP) and additional school plans, (e.g., Comprehensive Support and Improvement (CSI), Additional Targeted Support and Improvement (ATSI), School Plan for Student Achievement (SPSA), and action plans for making progress toward LCAP goals)
- Transparent governance and accountability to stakeholders, including consideration of input from the school’s committees/councils and stakeholders
- Monitoring of staffing needs and the school’s compliance with all applicable credentialing, clearance, and training requirements

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The Governing Board regularly considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input type="checkbox"/> The Governing Board considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Board meeting agendas, minutes, and meeting materials for meetings at which the Board reviewed: (B1.14a) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> CA School Dashboard Academic Performance Indicators (ELA, MATH, ELPI, CCI) <input checked="" type="checkbox"/> CA School Dashboard Academic Engagement Indicators (Chronic Absenteeism, Graduation Rate) <input type="checkbox"/> CA School Dashboard Conditions and Climate Indicator (Suspension Rate) <input checked="" type="checkbox"/> Attendance rate <input type="checkbox"/> Internal assessment data <input type="checkbox"/> Enrollment data <input checked="" type="checkbox"/> Staffing data (retention, turnover, certification, etc.) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Human Resources (HR) policies and procedures (B1.13) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14b) <input checked="" type="checkbox"/> Documentation of Board member and/or executive leadership training on topics that support responsive and accountable governance (e.g., data-driven decision making, Board roles and responsibilities, etc.) (B1.14c) <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



G5: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #5

<i>The Governing Board has a system in place to ensure fiscal viability:</i>					
<ul style="list-style-type: none"> • The school is fiscally strong and net assets are positive in the prior two independent audit reports. • If applicable, all LAUSD Board of Education-approved fiscal condition-related benchmark(s) are met by the required deadline(s). 					
Performance	Rubric				
Performance	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #d9d9d9;">Rubric</th> <th style="background-color: #d9d9d9;">Sources of Evidence</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s) <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report* <input type="checkbox"/> The school is fiscally weak or unstable**, net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division* <input type="checkbox"/> The school is consistently fiscally weak, net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division* *Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; multi-year reliance on financing resources for the school's operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level. **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. </td> <td style="vertical-align: top;"> <input type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input type="checkbox"/> Other financial information submitted by the school <input type="checkbox"/> Other: (see Fiscal Operations section below) </td> </tr> </tbody> </table>	Rubric	Sources of Evidence	<input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s) <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report* <input type="checkbox"/> The school is fiscally weak or unstable**, net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division* <input type="checkbox"/> The school is consistently fiscally weak, net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division* *Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; multi-year reliance on financing resources for the school's operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level. **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.	<input type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input type="checkbox"/> Other financial information submitted by the school <input type="checkbox"/> Other: (see Fiscal Operations section below)
Rubric	Sources of Evidence				
<input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s) <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report* <input type="checkbox"/> The school is fiscally weak or unstable**, net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division* <input type="checkbox"/> The school is consistently fiscally weak, net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division* *Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; multi-year reliance on financing resources for the school's operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level. **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.	<input type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input type="checkbox"/> Other financial information submitted by the school <input type="checkbox"/> Other: (see Fiscal Operations section below)				



G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE QUALITY INDICATOR #6

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

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

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school consistently adheres to the Governing Board approved fiscal policies and procedures, does not have any areas noted for improvement, and the two most current annual independent audits show no material weaknesses, deficiencies, and/or findings <input 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 type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input type="checkbox"/> Other: (see Fiscal Operations section below) Palisades Charter High’s independent audit report for the fiscal year ended 2021-2022 reported two audit findings/deficiencies relating to the school’s financial statements and federal programs. Please see further details in the Areas Noted for Further Growth and/or Improvement section below.

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

N/A



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3, Proficient
2020 California Department of Education’s (CDE) Charter School’s Performance Category	Middle Performing
<p>Does the charter school qualify for technical assistance? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>If yes, what is the school’s identification? (See additional information within “Notes” section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> - A1: Dashboard Schoolwide ELA Indicator – The schoolwide Dashboard ELA Indicator Status is High with an average DFS of 45.6, which is above the state average of -12.2. The school leadership attributes the school’s High performance in ELA to ongoing department meetings to discuss frameworks for raising expectations and instructional rigor; English grade level professional learning community focus on goals regarding equity, adapted curriculum and pacing plans; built in time for collaboration to review data and reflect on plans to improve; and professional development around authentic assessments, rubrics, and differentiation tools. The school did not meet participation rate of 95% in ELA schoolwide (94%) and for the Black or African American (91%), Socioeconomically Disadvantaged (93%), Students with Disabilities (73%), and White (92%) student groups. - A2: Dashboard Schoolwide Math Indicator – The schoolwide Dashboard Math Indicator Status is Medium with an average DFS of -31.9, which is above the state average of -51.7. The school did not meet participation rate of 95% in Math for the Black or African American (91%), Socioeconomically Disadvantaged (93%), Students with Disabilities (85%), and White (94%) student groups. - A3: Dashboard Schoolwide English Learner Progress Indicator – The school has no status assigned for the ELPI on the Dashboard. The school’s percentage of English Learners making progress towards English proficiency of 58.8% is above the state rate of 50.3%. - A6: Dashboard Schoolwide Suspension Rate Indicator – The schoolwide Dashboard Suspension Rate Indicator Status is Medium with 1.6% of students suspended at least once, which is below the state rate of 3.1%. - A7: Dashboard Schoolwide Graduation Rate Indicator – The schoolwide Dashboard Graduation Rate Indicator Status is Very High with 95.0% of graduated students is above the state rate of 87.4%. - A8: Dashboard Student Group ELA – In ELA, the school had seven numerically significant student groups (Asian, Black or African American, Latino, Socioeconomically Disadvantaged, Students with Disabilities, Two or More Races, White), and six of the seven numerically significant student groups 	



have “Status/Distance From Standard (DFS)” scores above the statewide DFS for those student groups. The Students with Disabilities student group had an average DFS of -99.1, which is lower than the state’s average DFS of -97.3.

Areas Noted for Further Growth and/or Improvement

- **A9: Dashboard Student Group Math** – In Math, the school had seven numerically significant student groups (Asian, Black or African American, Latino, Socioeconomically Disadvantaged, Students with Disabilities, Two or More Races, White), and three of the seven numerically significant student groups have “Status/Distance From Standard (DFS)” scores above the statewide DFS for those student groups.
 - The Black or African American student group had an average DFS of -125.3, which is lower than the state’s average DFS of -106.9.
 - The Latino student group had an average DFS of -99.3, which is lower than the state’s average DFS of -83.4.
 - The Socioeconomically Disadvantaged student group had an average DFS of -93.9, which is lower than the state’s average DFS of -84.0.
 - The Students with Disabilities student group had an average DFS of -186.4, which is lower than the state’s average DFS of -130.8.

School leaders shared that to improve math performance, the math department has adapted the curriculum and pacing plans to “fill gaps in students’ learning post COVID 19,” expanded the Math Lab program and collaboration with the Special Education department, and focused on the Math Policy and middle school math articulation with the local middle school. Additionally, the Pali Academy and Virtual Academy provide personalized learning for students using a blended curriculum.

Corrective Action Required

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

Notes:

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

A11: Reclassification - As of the time of the issuance of this Annual Performance-Based Oversight Visit Report, the state has not published the “Annual Reclassification (RFEP) Counts and Rates” for the 2021-2022 academic year. Considering this fact, the 2022- 2023 Annual Performance-Based Oversight Visit Report does not rate the Student Achievement and Educational Performance indicator “A11: English Learner Reclassification.” Please note that, depending on the release date of the 2021-2022 RFEP counts and rates, the District may elect to update and reissue a revised 2022-2023 Annual Performance-Based Oversight Visit Report with indicator A11 rated and calculated into the final overall Student Achievement and Educational Performance category rating.

The school employs the following English Learner (EL) Reclassification Criteria: Palisades Charter High adheres to the LAUSD reclassification criteria.



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

Graduation Criteria (high schools only):

GRADUATION REQUIREMENTS

Total credits required: 230 (5 credits = 1 semester class)

English	40 Credits	Physical Education	20 Credits
Social Science	30 Credits	Visual/Performing Arts	10 Credits
Science	20 Credits	Applied Technology	10 Credits
Mathematics	20 Credits	Electives	75 Credits
Health	5 Credits		

Students earn elective credits for college eligibility by completing additional math, science, and foreign language courses. Students are required to take 5 credits of Computer Science. Students must complete ten hours of community service per year. (Waived during COVID)

****NOTE: A charter school cannot receive a rating in this category greater than a 1 if the school has been identified as Low performing charter school based on the state’s published list. (Not applicable for the 2022-2023 school year due to the absence of updated performance classification. Will resume with updated performance classification published by the state.)***



A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELA data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very High <input checked="" type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is High; or Medium and at/above statewide Distance From Standard (“DFS”) <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the ELA Indicator on the Dashboard 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Math data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very High <input checked="" type="checkbox"/> The schoolwide Dashboard Math Indicator Status is High; or Medium and at/above statewide DFS <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Math Indicator on the Dashboard 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - QUALITY INDICATOR #3

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELPI data (CDE) 	
Rubric	Sources of Evidence



Performance	<input type="checkbox"/> The schoolwide Dashboard ELPI Status is Very High <input type="checkbox"/> The schoolwide Dashboard ELPI Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Medium and below statewide percentage; or Low <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Very Low <input checked="" type="checkbox"/> Not Available - No Status 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"/> Other: (Specify)
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A4: DASHBOARD SCHOOLWIDE COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - QUALITY INDICATOR #4

<i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i>		
<ul style="list-style-type: none"> California School Dashboard Schoolwide CCI data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - QUALITY INDICATOR #5

<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	<input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Very Low <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Low; or Medium and at/below statewide percentage <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Medium and above statewide percentage; or High <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Very High <input type="checkbox"/> Not Available - No Status assigned for the Chronic Absenteeism Indicator on the Dashboard <input checked="" type="checkbox"/> Not Applicable - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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

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

A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR - (GRADES 9-12) - QUALITY INDICATOR #7

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Graduation Rate Indicator data (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Medium and below statewide percentage; or Low <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Graduation Rate Indicator on the Dashboard <input type="checkbox"/> Not Applicable - The Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> Parent-Student Handbook or other documentation of school's graduation requirements (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD STUDENT GROUP ELA - QUALITY INDICATOR #8

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant student groups (30 or more students) on the California School Dashboard ELA (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE) 	
Rubric	Sources of Evidence



Performance	<input type="checkbox"/> All numerically significant student groups have “Status/Distance From Standard (DFS)” scores above the statewide DFS <input checked="" type="checkbox"/> The majority of numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Less than a majority of the numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> None of the school’s numerically significant student groups have “Status/DFS” scores above the statewide DFS <input type="checkbox"/> Not Available - No assessment of performance for this indicator	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)
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A9: DASHBOARD STUDENT GROUP 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 student groups (30 or more students) on the California School Dashboard Math (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE)

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

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

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

- Performance of all numerically significant student groups (30 or more students) on the California School Dashboard CCI (Students with Disabilities, English Learners, and Socioeconomically Disadvantaged, etc.)(CDE)

	Rubric	Sources of Evidence



Performance	<input checked="" type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input 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 2021-2022 (CDE)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school reclassified English Learners at a rate higher than the state average <input type="checkbox"/> The school reclassified English Learners at a rate similar to the state average <input type="checkbox"/> The school reclassified English Learners at a rate lower than the state average <input type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> Not Applicable - The school did not have any English Learners <input checked="" type="checkbox"/> No Reclassification data for the 2021-2022 school year published by the state at the time of the issuance of this report. Please see "Notes" section above.	<input type="checkbox"/> Reclassification report (CDE) <input type="checkbox"/> Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input type="checkbox"/> Master Plan for English Learners adopted by school's Governing Board (B3.2i)

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

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

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

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

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

Academic Progress Indicator: CAASPP (ELA)	Grade Levels: 11	Assessment Administration: Annually/Spring	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
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Academic Progress Indicator: CAASPP (Math)

Grade Levels: 11

Assessment Administration:
Annually/Spring

95% Participation Met*:
 Met Not Met

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

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

Postsecondary Outcomes (high school only):

1. The charter school uses the (see notes below) data source and included the results of at least 95% of eligible students. If the charter school did not meet the 95% participation, the charter school’s plan to address the participation is included in the Notes below.
2. The charter school did not include the number of eligible students and missing or non-participating students.
3. The charter school provided evidence of comparing the data to similar peers (which may include, but not limited to, similar demographics, pupil student groups, first-time college attendance, or other similar circumstances and if not available, comparison to statewide data).

Notes:

School noted that the school utilizes the Reading Inventory (SRI) for 9th grade students, which is administered in the Fall and Spring. Additionally 9-12 grade students are assessed on the UCLA MDTP Readiness Test in the fall. 95% met the participation rate for both assessments.

School leaders shared that Palisades Charter High utilized the following postsecondary indicators to analyze postsecondary outcomes: CALPADS, College Board Suite of Assessments, Dataquest, FAFSA, CSU and UC Enrollment Dashboards; and all eligible graduating students submit a Postsecondary Information plan. For the class of 2022, over 90% of 12th grade students planned to attend postsecondary school upon graduation (55% 4-year university, 35% community college), 3% plan to enter the workforce or military, and the remaining were undecided.

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. In 2022, Students with Disabilities student group Dashboard Math Indicator Status is Very Low, with an average DFS of -186.4, which is above the Resident Schools average DFS of -209.6 for the same student group. CSD will continue to monitor through oversight.



LOCAL CONTROL ACCOUNTABILITY PLAN 2022-2023 (For Informational Purposes Only)

<i>The CSD reviewed the Local Control Accountability Plan.</i>	
All requested template information and descriptions were provided:	Sources of Evidence
<input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Supplement to the Annual Update to the 2021-2022 LCAP <input checked="" type="checkbox"/> 2022-2023 Plan Summary <input checked="" type="checkbox"/> Engaging Educational Partners <input checked="" type="checkbox"/> Goals and Actions <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students <input checked="" type="checkbox"/> Action Tables	<input checked="" type="checkbox"/> Local Control Accountability Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)
Notes:	
None	



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	2, Developing
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<ul style="list-style-type: none"> - O1: School Health and Safety Plan and Procedures – The school has a well-developed system in place to ensure the protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety. 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, Student ID card with Lifeline number, and Board-adopted policy on pupil suicide prevention (May 16, 2017). - 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. This includes full implementation of all key features, regularly reviewing and analyzing school and student progress towards annual goals and/or monitoring student progress toward completion of graduation and A-G requirements and providing ongoing professional development specific to student outcomes and key features as outlined in the charter. A review of documents in Binder 3, discussion with school leadership, and classroom observation show the following: <ul style="list-style-type: none"> o Standards-based and data-driven instructional program o Professional Learning Communities o Research-based instruction and grading methodology, personalized instruction including the Virtual Academy, Pali Academy, Credit Recovery, Study Center Tutoring Program, Pali Periods, and Student Success Teams o Support classes and programs, such as the multilingual program, Study Center Tutoring program and Schoology course, Literacy, Library-Pali Cares and Library course, collaborative class, etc. o Digital literacy o College and career readiness which include Career Technical Education (CTE) led by a dedicated CTE Coordinator, honors courses, college prep courses, AP courses, senior seminar, etc. <p>The school leadership identified the following focus areas which were observed during the classroom observations: Student engagement through dialogue, student-discussions, and pair-share; Student leadership and empowerment; and Student-centered and personalized learning.</p> - O6: School Climate and Student Discipline – The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights as evidenced by the tiered behavior intervention, alternatives to suspension, schoolwide positive behavior support, data monitoring, procedures of preventing bullying, and a 2021-2022 suspension rate of 1.6%. The school has a dedicated team and various onsite programs to address student wellness, safety, and inclusion. Students have the opportunity to participate in a variety of clubs for positive student engagement, including student body leadership, community-focused groups, social/cultural groups, and others that support various student interests. - O8: Stakeholder Engagement and Involvement – The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns as evidenced by opportunities to participate in regular committees such as the 	



Long Term Strategic Planning and Budget and Finance committees where the WASC Visit Preparation, Local Control and Accountability Plan and Goals, Budget, CA School Dashboard Indicators, and sub-committee information (Academic Achievement and Innovation, Facilities, Family and Community, Fundraising/Developing, Technology) is shared.

- **O9: Transparency for Stakeholders** – The school has a well-developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website 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.
- **O10: Evaluation of School Staff** – 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. A review of the documents include evaluation procedures with clear performance standards and tools for administrators, classified, classified mid-management, and unrepresented staff.
- **O11: Clearances and Credentialing Compliance** – The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with all applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times. A review of the *Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023* and supporting documents evidence all certificated employees are fully credentialed and appropriately assigned and the school obtained all necessary employee and vendor clearances, including criminal background and tuberculosis risk assessments/clearances, prior to employment or provision of services. At the time of the oversight visit, the school had one custodian of records and one application pending for a second custodian of records.

Areas Noted for Further Growth and/or Improvement

- **O2: Health and Safety Training and Preparation** – The school has a partially developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety. Although the school provided evidence of regular emergency drills, including fire, earthquake, active intruder, and shelter-in-place, Epi-pens, Automatic External Defibrillators (AED), staff trainings, and use of Epi-pens, at the time of the oversight visit, the school had one returning staff (in-house substitute) who completed the Child Abuse Mandated Reporter training past the six weeks of the first day of instruction. As noted, and highlighted below, “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.” School leadership provided a plan to ensure compliance with child abuse mandated reporter training, which includes termination of non-returning staff (including substitutes, seasonal staff, and retired staff) and reprocessing as a new hire upon return. CSD will continue to monitor through oversight.

Corrective Action Required

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



Notes:

None

***NOTE:**

- *A charter school cannot receive a rating in this category greater than 1 for any of the following reasons: (1) Failed to complete criminal background clearances for any new staff and/or sole proprietor (as defined on the Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; and/or (2) Failed to have Health, Safety, and Emergency Plan in place.*
- *A charter school cannot receive a rating in this category greater than 2 for any of the following reasons: (1) Failed to conduct child abuse mandated reporter training in accordance with Education Code 44691; or (2) Any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.*
- *A charter school may receive a rating of 1 in this category if the school is in breach of the operative charter, including Federal, State, and District Required Language related to this section.*



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

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

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

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed system in place to ensure the protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input checked="" type="checkbox"/> Certificate(s) of Occupancy or equivalent (B3.1b) <input checked="" type="checkbox"/> Student immunization (B3.1h) <input checked="" type="checkbox"/> Health screening (B3.1h) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1c) <input checked="" type="checkbox"/> Evacuation route maps (B3.1c) <input checked="" type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.1k) <input type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1f) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Site/classroom observation <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

The school has a system in place to ensure:

- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol). School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting, as outlined in Ed. Code, § 44691.
- Maintenance of an emergency epinephrine auto-injector (“epi-pen”) onsite and training has been provided to volunteer staff member(s) in the storage and emergency use, per Ed. Code § 49414
- For schools offering an interscholastic athletic program, at least one automated external defibrillator (AED) is onsite and available for use, as outlined in Ed. Code § 35179.6
- Staff receive annual training in Pupil Suicide Prevention and Awareness (as applicable) pursuant to Ed. Code §215.
- Staff receive training in bloodborne pathogens, per 8 California Code of Regulations (“CCR”), § 5193

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a well-developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input checked="" type="checkbox"/> The school has a partially developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1g) <input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1c) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.5) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.5) <input checked="" type="checkbox"/> Pupil Suicide Prevention and Awareness Training (B3.1f and B3A.5) <input checked="" type="checkbox"/> Epi-pen and training (B3.1i) <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.1j) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023 (“ESSA Grid”)</i> (B3A.1) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

	Rubric	Sources of Evidence
Performance	<input 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. This includes full implementation of all key features, regularly reviewing and analyzing school and student progress towards annual goals and/or monitoring student progress toward completion of graduation and A-G requirements and providing ongoing professional development specific to student outcomes and key features as outlined in the charter. <input type="checkbox"/> The school has implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has partially implemented the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served <input type="checkbox"/> The school has minimally implemented, or not at all, the educational program, including key features, outlined in the school’s charter and aligned to California State Content Standards specific to the grade levels served	<input checked="" type="checkbox"/> Implementation of an educational program serving all grade levels approved to be served per charter (B3.2i, B3.2j, B3.2k) <input checked="" type="checkbox"/> Standards-based instructional program (evidence of grade level and/or content lesson plans, unit plans) (B3.2a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.2c) (new schools only) <input checked="" type="checkbox"/> WASC accreditation (B3.2d) <input checked="" type="checkbox"/> UC Doorways course approval documentation (B3.2e) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <input checked="" type="checkbox"/> Evidence of system for monitoring student progress toward and completion of graduation and A-G requirements (B3.2g) <input checked="" type="checkbox"/> Mathematics Placement Assessment (school serving 9 th graders) (B3.2m) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

The school has a system in place to ensure:

- Implementation of differentiated instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all numerically significant student groups identified in the school’s LCAP and by the CDE
- Implementation of internal student assessments aligned with instructional outcomes to determine student mastery of California State Content Standards
- Disaggregation and analysis of data on a regular basis to address individual student needs and guide instructional planning and use of interventions
- Implementation, review, and modification, as appropriate, of its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification)

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



O5: SPECIAL EDUCATION - QUALITY INDICATOR #5

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

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

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input checked="" type="checkbox"/> The school has a system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA <input type="checkbox"/> Charter school does not participate in LAUSD's SELPA	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> District Validation Review (DVR) (B3.3a) <input checked="" type="checkbox"/> Self-Review Checklist (B3.3a) <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.3a) <input checked="" type="checkbox"/> Professional development documentation (B3.3a and B3.3c) <input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.2j) <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input type="checkbox"/> Other special education documentation (B3.3a) <input type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

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

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <input checked="" type="checkbox"/> Implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.3b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention (e.g. SSPT) (B3.3b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.3b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.3b) <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.3b) <input checked="" type="checkbox"/> Data monitoring (B3.3b) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7

<p>The school:</p> <ul style="list-style-type: none"> • Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs • Provides faculty and other instructional staff with professional development opportunities to improve instructional practice • Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter	<input checked="" type="checkbox"/> LCAP (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development year-long plan agendas, and sign-ins) (B3.3c) <input checked="" type="checkbox"/> Professional development training materials (B3.3c) <input type="checkbox"/> System to assess professional development needs (B3.3c) <input type="checkbox"/> Classroom/site observation <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



O8: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR #8

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

- Provides parents, teachers, and students with meaningful opportunities for involvement and engagement that meet the requirements and goals of applicable federal and state law, the school’s charter, and the school LCAP
- Implements a School Site Council (SSC) and/or English Learner Advisory Committee (ELAC) in accordance with legal requirements (e.g., member composition of committee/council, legally required topics, etc.), if applicable
- The liaison for students experiencing homelessness has identified this population through outreach and coordination activities with other organizations, and provided related referral of services to families, children, and youth experiencing homelessness.

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.3d) <input checked="" type="checkbox"/> Stakeholder consultation (B3.3d) <input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.3d) <input checked="" type="checkbox"/> Foster youth/students experiencing homelessness liaison (B3.3d) <input checked="" type="checkbox"/> School website (B3.3e) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



O9: TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

<p><i>The school has a system in place to ensure that it operates in a transparent manner and keeps stakeholders informed, including:</i></p> <ul style="list-style-type: none"> • Information is easily accessible to the public and school stakeholders, including but not limited to applicable categories described in Charter School Transparency Resolution • UCP and all complaint procedures • Title IX information is available in applicable languages as required by law • Per Ed. Code § 234.6 and District policy, specified information relating to suicide, bullying, discrimination and harassment prevention, among other things, are readily accessible in a prominent location on the school website in a manner that is easily accessible to parents/guardians and students • Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance • Notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year, in accordance with Ed. Code, § 49428 • Identifies and implements the most appropriate methods of informing parents and guardians of pupils in grades 6-12 of human trafficking prevention resources, in accordance with Ed. Code, § 49381 • Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements, in accordance with Ed. Code, § 47605 (high schools only) 	
Rubric	Sources of Evidence



Performance	<input checked="" type="checkbox"/> The school has a well-developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website	<input checked="" type="checkbox"/> UCP Procedure and Forms (B1.11) <input checked="" type="checkbox"/> Complaint Procedure and Forms (B1.12) <input checked="" type="checkbox"/> Review of the following information posted to the school’s website (B3.3e) : <input checked="" type="checkbox"/> LCAP, per Ed. Code § 47606.5(h) <input checked="" type="checkbox"/> Current Board agenda in compliance with Brown Act, per Gov. Code, §54954.2(a)(1) <input checked="" type="checkbox"/> Website posting required per Ed. Code § 234.6 (B3.3e) : <input checked="" type="checkbox"/> Policy on Pupil Suicide Prevention <input checked="" type="checkbox"/> Title IX information, including a link to CDE’s Title IX website <input checked="" type="checkbox"/> Policies on anti-discrimination, anti-harassment, anti-intimidation, anti-bullying, and sexual harassment policies, including: <input checked="" type="checkbox"/> Anti-cyberbullying procedures <input checked="" type="checkbox"/> Social media anti-bullying procedures <input checked="" type="checkbox"/> Link to statewide resources including community based organizations compiled by CDE <input checked="" type="checkbox"/> Sharing accessible and relevant information about individual student, student group, and schoolwide academic progress and performance with all stakeholders as appropriate (B3.3e) <input checked="" type="checkbox"/> Access to approved charter (B3.3e) <input checked="" type="checkbox"/> Compliance with the LAUSD BOE’s Charter School Transparency Resolution, including (B3.3e) : <input checked="" type="checkbox"/> Financial Audit <input checked="" type="checkbox"/> Student Demographics <input checked="" type="checkbox"/> Documentation of informing parents/guardians about transferability of courses/course credit and eligibility to meet A-G requirements (high schools only) (B3.3e) <input checked="" type="checkbox"/> Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.3e) <input checked="" type="checkbox"/> Notification of access to available mental health services (B3.3e) <input checked="" type="checkbox"/> School website (B3.3e) <input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

<p><i>The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements, including:</i></p> <ul style="list-style-type: none"> • Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff • Evaluation tool(s) for all school-based staff, including but not limited to administrators, certificated staff, and classified staff 		
Performance	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

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

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- Individuals who have been continuously employed in a teaching position since the 2019–20 school year obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code § 47605.4(a).)
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform school site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with all applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Human Resources (HR) policies and procedures regarding clearances and ESSA qualifications and credentialing requirements (B1.13) <input checked="" type="checkbox"/> Staff roster (B3A.1b) <input checked="" type="checkbox"/> School master schedule (B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a, B3A.3, and B3A.4) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor clearances and credentialing certifications (B3A.6) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.7) <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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



On October 15, 2019, 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.

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 Latino and Socioeconomically Disadvantaged student groups increased from 2020-2021 to 2021-2022. The Black or African America and English Learner student groups show a decrease from 2020-2021 to 2021-2022. 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
2021-2022 Enrollment by Ethnicity and Student Group	2,988	27.3%	0.0%	0.1%	5.3%	9.1%	0.8%	0.9%	0.1%	0.2%	21.9%	0.0%	0.2%	0.0%	28.1%	8.4%	6.7%	55.8%
2020-2021 Enrollment by Ethnicity and Student Group	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%



8798	2019-2020					2020-2021					2021-2022				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Palisades Charter High															
Cash and Cash Equivalents		7,995,349	8,097,029	10,277,646	10,907,886		7,818,645	7,969,248	15,241,779	15,895,051		11,874,110	12,501,660	17,573,365	17,488,865
Current Assets		10,524,306	10,625,986	16,263,631	16,214,121		16,355,834	16,594,985	18,843,408	19,146,611		16,439,110	17,066,660	20,166,633	20,360,731
Fixed and Other Assets		7,731,542	7,731,542	7,785,828	7,785,829		7,761,210	7,761,207	7,265,685	7,265,684		8,145,605	8,145,605	6,730,207	6,730,206
Total Assets		18,255,848	18,357,528	24,049,459	23,999,950		24,117,044	24,356,192	26,109,093	26,412,295		24,584,715	25,212,265	26,896,840	27,090,937
Deferred Outflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		3,461,667	3,429,774	5,186,424	5,031,079		5,113,738	3,831,950	9,350,046	4,927,422		9,188,500	4,582,500	17,927,917	9,047,192
Other Long Term Liabilities		19,251,739	1,318,867	4,606,000	4,690,859		4,606,000	4,606,000	0	97,449		0	0	0	97,449
Unfunded OPEB Liabilities		0	19,170,911	19,698,581	21,209,024		19,698,581	21,209,024	21,209,024	14,438,638		21,209,024	14,430,932	0	10,262,085
Total Liabilities		22,713,406	23,919,552	29,491,005	30,930,962		29,418,319	29,646,974	30,559,070	19,463,509		30,397,524	19,013,432	17,927,917	19,406,726
Deferred Inflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		(4,457,558)	(5,562,024)	(5,441,546)	(6,931,012)		(5,301,275)	(5,290,782)	(4,449,977)	6,948,786		(5,812,808)	6,198,833	8,968,923	7,684,211
Total Revenues	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	39,950,523	40,499,824	40,895,633	39,526,330	40,901,805
Total Expenditures	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	39,690,488	41,862,655	41,645,587	37,506,193	40,166,380
Net Income / (Loss)	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	260,035	(1,362,831)	(749,954)	2,020,137	735,425
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	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	260,035	(1,362,831)	(749,954)	2,020,137	735,425
Net Assets, Beginning	(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)	(5,919,818)	(4,449,977)	(4,449,977)	(4,449,978)	6,948,786
Adj. for restatement / Prior Yr Adj	0	0	(1,233,882)	(1,233,882)	0	0	6,512	6,512	(1,489,466)	0	0	0	11,398,764	11,398,764	0
Net Assets, Beginning, Adjusted	(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)	(5,919,818)	(4,449,977)	6,948,787	6,948,786	6,948,786
Net Assets, End	(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	(5,659,783)	(5,812,808)	6,198,833	8,968,923	7,684,211
Unrestricted Net Assets		(4,457,558)	(5,562,024)	(5,441,546)	(7,948,081)		(5,301,275)	(5,290,782)	(5,475,866)	6,033,796		(6,838,698)	5,172,943	506,745	6,561,595
Restricted Net Assets		0	0	0	1,017,069		0	0	1,025,889	914,990		1,025,890	1,025,890	8,462,178	1,122,616

8798	Audited Financials					2022-2023				
	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Palisades Charter High										
Cash and Cash Equivalents	6,774,610	10,907,886	15,895,051	17,488,865	0		16,089,778	17,376,694	0	0
Current Assets	8,261,941	16,214,121	19,146,611	20,360,731	0		18,715,765	20,002,681	0	0
Fixed and Other Assets	8,201,647	7,785,829	7,265,684	6,730,206	0		7,100,000	7,100,000	0	0
Total Assets	16,463,588	23,999,950	26,412,295	27,090,937	0		25,815,765	27,102,681	0	0
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0
Current Liabilities	3,434,353	5,031,079	4,927,422	9,047,192	0		16,671,015	17,522,015	0	0
Other Long Term Liabilities	6,882	4,690,859	97,449	97,449	0		0	661,559	0	0
Unfunded OPEB Liabilities	19,772,327	21,209,024	14,438,638	10,262,085	0		0	0	0	0
Total Liabilities	23,213,562	30,930,962	19,463,509	19,406,726	0		16,671,015	18,183,574	0	0
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0
Net Assets	(6,749,974)	(6,931,012)	6,948,786	7,684,211	0		9,144,750	8,919,107	0	0
Total Revenues	37,634,114	37,432,826	43,719,595	40,901,805	0	41,627,951	43,983,246	45,152,315	0	0
Total Expenditures	39,588,263	37,613,864	29,839,797	40,166,380	0	40,446,622	43,807,419	43,905,077	0	0
Net Income / (Loss)	(1,954,149)	(181,038)	13,879,798	735,425	0	1,181,329	175,827	1,247,238	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	(1,954,149)	(181,038)	13,879,798	735,425	0	1,181,329	175,827	1,247,238	0	0
Net Assets, Beginning	(4,795,825)	(6,749,974)	(6,931,012)	6,948,786	0	7,325,074	8,968,923	8,968,923	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	(1,297,054)	0	0
Net Assets, Beginning, Adjusted	(4,795,825)	(6,749,974)	(6,931,012)	6,948,786	0	7,325,074	8,968,923	7,671,869	0	0
Net Assets, End	(6,749,974)	(6,931,012)	6,948,786	7,684,211	0	8,506,403	9,144,750	8,919,107	0	0
Unrestricted Net Assets	(7,530,200)	(7,948,081)	6,033,796	6,561,595	0		7,572,186	5,892,146	0	0
Restricted Net Assets	780,226	1,017,069	914,990	1,122,616	0		1,572,564	3,026,961	0	0



FISCAL OPERATIONS

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

According to the CSD’s Fiscal Operations Rubrics, the highest fiscal rating that schools with material 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 2021-2022 reported two audit findings/deficiencies relating to the school’s financial statements and federal programs. Please see further details in the Areas Noted for Further Growth and/or Improvement section 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 2021-2022 independent audit report, the school had positive net assets of \$7,684,211 and net income of \$735,425. The 2022-2023 Second Interim projected positive net assets of \$8,931,449 and net income of \$1,247,238.

Financial Highlights

	FINANCIAL HIGHLIGHTS				
	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Audited Actuals)	2022-2023 (Second Interim)
Palisades Charter High					
Net Assets	(\$6,749,974) ¹	(\$6,931,012) ¹	\$6,948,786 ¹	\$7,684,211 ¹	\$8,931,449
Net Income / (Loss)	(\$1,954,149) ^{1,2}	(\$181,038) ^{1,3}	\$13,879,798 ^{1,4}	\$735,425 ¹	\$1,247,238
Transfers In / Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
Cash and Cash Equivalents	\$6,774,610	\$10,907,886	\$15,895,051	\$17,488,865	\$17,376,694
Unrestricted Net Assets	(\$7,530,200)	(\$7,948,081)	\$6,033,796	\$6,561,595	\$5,904,488
Norm Enrollment Reported by the School	2,973	3,031	3,097	2,982	2,967
	FINANCIAL RATIO ANALYSIS				



Cash Reserve Level (Cash Balance/Total Expenditures) <i>5% and greater is recommended</i>	17.11%	29.00%	53.27%	43.54%	39.58%
Fund Reserve (Reserve for Economic Uncertainty) (Unrestricted Net Assets /Total Expenditures) <i>3% - 5% and greater is recommended (depending on the school's ADA)</i>	0.00%	0.00%	20.22%	16.34%	13.42%
Current Ratio (Working Capital Ratio) (Current Assets/Current Liabilities) <i>At least 1.2 or 120% is recommended</i>	240.57%	322.28%	388.57%	225.05%	114.16%
Debt Ratio (Total Liabilities/Total Assets) <i>Lower than 1.0 or 100% is recommended</i>	141.00%	128.88%	73.69%	71.64%	67.09%

¹ According to Palisades Charter High’s independent audit reports, as of June 30, 2019, 2020, 2021, and 2022, the accumulated post-retirement benefit obligation (APBO) was estimated at \$19,772,327, \$21,209,024, \$14,438,638, and \$10,262,085 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 \$1,234,631, \$1,436,697, **(\$6,770,386)**, and **(\$4,176,553)** for Fiscal Years 2018-2019 through 2021-2022, 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.

Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition is positive. Please refer to the Financial Highlights table above.

Areas Noted for Further Growth and/or Improvement:

1. **2021-2022 Audited Financial Statement Findings:**



Per Palisades Charter High's 2021-2022 independent audit report, two findings noted deficiencies: one regarding the reporting of the school's other postemployment benefit liability reporting and the other regarding the use of grant funds. The audit report states:

“FINDING 2022-001: OTHER POSTEMPLOYMENT BENEFIT LIABILITY REPORTING (30000)”

Criteria: *In accordance with the Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 715, Compensation — Retirement Benefits, an actuarial study is required annually for other postemployment benefit (OPEB) plans. The actuarial study enables the Charter to measure and disclose an amount for annual OPEB cost on the accrual basis of accounting.*

Condition: *The Charter's most recent actuarial study is dated December 7, 2021. The Charter has not yet obtained an actuarial study for the 2021-22 fiscal year; therefore, the net other postemployment liability was not properly reported to consider the newly established trust asset and required audit adjustment.*

Context: *The incident appears isolated. Since the required implementation of FASB ASC 715 by the Charter, the Charter has obtained an annual actuarial study.*

Effect: *The Charter did not adhere to the requirements of FASB ASC 715. The recent actuarial study does not provide an accurate projection of the Charter's OPEB liability as of June 30, 2022 because it does not include the Charter's \$5 million investment in the OPEB trust asset.*

Cause: *The current actuarial study is in progress but was not completed in time for this report.*

Repeat Finding: *This is not a repeat finding.*

Recommendation: *We recommend that the Charter obtain a new actuarial study on its OPEB obligation for the fiscal year 2021-22 and rely on the study for only one fiscal year before obtaining another OPEB actuarial study.*

Corrective Action Plan: *The Charter was working closely with the Actuary and provided them with all the information needed to issue a new actuarial study before the audit report date. However, the Actuary was unable to complete the report on time. The Charter will have a new actuarial study completed before the close of the current fiscal year 2022-23.*

FINDING 2022-002: EDUCATION STABILIZATION FUND DISCRETIONARY GRANTS– SPECIAL TESTS AND PROVISIONS (50000 & 30000)

CFDA Number and Title: *84.425 and 84.425C - Education Stabilization Fund Discretionary Grants: Governor's Emergency Education Relief (GEER) Fund and Elementary, Secondary School Emergency Relief (ESSER) Fund*

Federal Grantor Name: *U.S. Department of Education; Passed through California Department of Education*



Criteria: Consistent with 2 CFR section 200.311 (real property), section 200.313 (equipment), and section 200.439 (equipment and other capital expenditures) Education Stabilization Funds (ESF) may be used to purchase equipment. Capital expenditures for general and special purpose equipment purchases are subject to prior approval by Education Department (ED) or the pass-through entity. In addition, with prior approval by the ED or the pass-through entity, recipients and subrecipients may use ESF funds to purchase real property and perform construction for improvements to land, buildings, or equipment that meet the overall purpose of the ESF program, which is “to prevent, prepare for, and respond to” the COVID-19 pandemic.

Condition: The Charter used funding from the Elementary and Secondary School Emergency Relief II (ESSER II) Fund program for one capital expenditure. The funding terms and conditions require the Charter to obtain approval from the funding agency prior to incurring the expenditure. The Charter was unable to provide documentation that the required approval was obtained.

Cause: The error is a result of the Charter not understanding the terms and conditions of the requirements of the grant agreement.

Effect: The effect of not obtaining the required approval resulted in a total of \$90,000 in allowable ESF expenditures. Additionally, this error could result in potential loss of funding under this grant.

Context: Due to new COVID-19 Emergency Acts Funding this fiscal year, the Charter was unaware this was a requirement for ESSER and GEER.

Questioned Costs: The questioned cost is \$90,000.

Repeat Finding: This is not a repeat finding.

Recommendation: We recommend the Charter develop and implement policies and procedures whereby staff obtain an understanding of the funding terms and conditions of all grants in order to prevent future violations of compliance requirements. We recommend the Charter develop and implement policies and procedures whereby staff obtain an understanding of the funding terms and conditions of all grants in order to prevent future violations of compliance requirements. Management should obtain proper training through the appropriate regulatory and granting agencies.”

In response to the audit finding regarding the other postemployment benefit (OPEB) liability reporting the school shared that historically the school completed the actuarial valuation every two years and that “moving forward (for the 2022-23 year and beyond), the Chief Business Officer (CBO) will ensure that the actuary and independent audit firm connect early in the process. The CBO will also ensure timely delivery of census data, health/benefit information, and financial documents by June 30th of each year. Unaudited actuals will be provided as soon as they are available, no later than Aug 30th of each year. This will ensure that the actuary firm has time to complete the valuation report and collaborate with the independent audit firm to accurately report the school’s OPEB liability.”

In response to the audit finding regarding the school’s non-compliance in obtaining preapproval from the funding agency for capital expenditures the school shared that it had subsequently submitted a capital expenditure preapproval to the CDE in December of 2022 and is awaiting a decision. The school stated that the CBO would be participating in ESSER/GEER training and has also enrolled in a request-for-proposal(RFP)/bidding webinar. Additionally, the school stated that “moving forward, there is now clarity on the CDE requirement for using ESSER funds on capital expenditures and the finding will be isolated to the current audit report.”



The governing board and leadership team of the charter school are responsible for managing the operations of the school. The CSD recommends that the Annual Performance-Based Oversight Visit Report, including the above-noted fiscal findings and observations, be discussed at Palisades Charter High's next governing board meeting, highly preferably no later than 90 days following the school's receipt of this report, so that the charter school and its governing board may address any issues early enough to implement changes in order to see results in its next fiscal year. It is the school's responsibility to provide the CSD its action plans/steps, proof of implementation of the mitigating actions taken by the school, and/or documentation (e.g., governing board meeting agendas and approved board meeting minutes, etc.), as applicable, prior to or during the next Annual Performance-Based Oversight Visit. The CSD will continue to monitor these issues through oversight.

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

1. Other Postemployment Benefits:

Per the school's 2021-2022 independent audit report, Palisades Charter High's investment accounts that are considered plan assets associated with the school's OPEB is valued at \$4.9M as of June 30, 2022. As noted in the Financial Highlights section above, the school's accumulated post-retirement benefit obligation is \$10,262,085 as of the 2021-2022 independent audit. This is the net liability after accounting for the investment account plan assets.

As of the writing of this report the school has not established an OPEB trust. Per the school, efforts were made to establish a trust with a banking institution in January 2023 in which the bank communicated to the school that they could act as the trust administrator. However, after the school sent a sample trust document to the bank, the bank recommended utilizing a third party trust attorney to draft the trust. The school anticipates that a trust attorney will have the documents drafted by the end of July and subsequently presenting to the school's governing board at a future board meeting.

The school contributed \$790,000 to the OPEB funds in Fiscal Year 2021-2022 and anticipates contributing \$790,000 in both Fiscal Years 2022-2023 and 2023-2024, respectively, exceeding the 20-year funding schedule analysis provided with the school's last actuarial report as of June 30, 2021. The school's 2021-2022 independent audit reported a finding regarding the non-adherence to FASB ASC 715 and the requirements of obtaining an annual actuarial study for the school's OPEB liability. Please see the Areas Noted for Further Growth and/or Improvement section above for additional information.

As the school continues to address the OPEB obligation, the CSD 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 through oversight.



2. Credit Card Late Fees:

Based on the CSD’s review of the school’s credit card statements for the period spanning from September 2022 through February 2023, the CSD noted that the credit card statements provided by the charter operator referenced late fees. These late fees, as reflected on the credit card statements, are summarized below.

Item #	Acct #	Month	Posting Date	Finance Charges	Transaction Description
1	X0565	September 2022	9/30/2022	\$62.81	Late Fees
2	X0565	October 2022	10/31/2022	\$70.66	Late Fees
3	X0565	November 2022	11/30/2022	\$38.30	Late Fees
4	X0565	December 2022	12/31/2022	\$33.72	Late Fees
5	X0565	January 2023	1/31/2023	\$61.57	Late Fees
6	X0565	February 2023	2/28/23	\$45.68	Late Fees
			TOTAL	\$312.74	

In response to the CSD’s observation above, the school identified a few factors that contributed to late fees: (1) transition of duties created by a vacancy in the Finance Manager role (2) cross-training duties required due to transition of the associated student body clerk and (3) CBO oversight. The school states that “the school takes precaution on each credit card transaction and ensures receipts align with PO amounts and billed amounts. As a result of this due diligence, some of the payments were submitted late.” The school states that credit card reports are presented at the monthly Budget & Finance Committee and Board meetings and besides showing expenses and funding sources the school will also disclose "unpaid balances" and any applicable late fees to be more transparent. The CBO’s goal is to avoid these fees in the future.



The CSD recommends that the school implement procedures to track all recurring and non-recurring invoices and billing statements and ensure that all vendors and credit card balances are paid timely, to prevent the school from incurring additional late fees and/or interest charges in the future.

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

State of California Education Code § 47605(m) requires each charter school to transmit a copy of its annual independent financial audit report for the preceding year by December 15 of each year. Consistent with guidance provided by the Los Angeles County Office of Education (LACOE), LAUSD granted an extension based on Palisades Charter High’s request through January 15, 2023, and its extraordinary reasons provided to the CSD. Palisades Charter High cited staffing shortages in the school’s finance office at the Finance Manager and Finance Clerk positions. In addition, the school noted that the audit firm informed the school that the auditor did not have the staffing capacity to review the submitted items before the December 15 deadline. This extension does not waive the legal deadline specifically set forth in applicable state law, but rather permits the filing of the report after the deadline. Palisades Charter High’s annual independent audit report was received on February 15, 2023.

The Charter Schools Division will continue to monitor this issue referenced above during the next oversight visit. The results may be factored into the school’s rating for next year.

Corrective Action Required:

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

**Notes:****I. Review of Fiscal Documentation**

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2022, and noted the following:
 - a. Audit opinion: Unmodified/Unqualified.
 - b. Material weaknesses: None Reported.
 - c. Deficiencies/Findings: Yes, please see the description below.
Palisades Charter High's 2021-2022 independent audit reports two findings: one regarding the reporting of the school's other postemployment benefit liability reporting and the other regarding the use of grant funds. Please see the Area Noted for Further Growth and/or Improvement section above for further details.
 - d. Lack of a Going Concern: None Reported.
2. The 2021-2022 audited and unaudited actuals do not mirror each other. The variances in Current Liabilities and Total Expenditures are primarily due to adjustments related to the OPEB investment account recorded by the auditors.
3. The school's reported Norm Enrollment was 2,973, 3,031, 3,097, 2,982, and 2,967 students for Fiscal Years 2018-2019, 2019-2020, 2020-2021, 2021-2022, and 2022-2023 respectively, representing an accumulated decrease in enrollment of 6 students since Fiscal Year 2018-2019. The school's reported Norm Enrollment for Fiscal Year 2022-2023 is 2,967 students, which is 33 students (or approximately 1.1%) below its projected student enrollment for Fiscal Year 2022-2023 (i.e., 3,000 students) per the school's petition enrollment roll-out plan in its current charter. As noted above, the school has maintained a balanced budget for Fiscal Year 2021-2022 and projects a balanced budget for Fiscal Year 2022-2023 per its 2022-2023 Second Interim Financials. The CSD will continue to monitor the school's student enrollment through oversight.
4. A Segregation of Duties (SOD) review(s) was conducted remotely at Palisades Charter High via videoconference. No discrepancies were noted.
5. Reviewed 15 checks (and 3 electronic credit/debit transactions). No discrepancies were noted.
6. Reviewed bank statements and bank reconciliations from September 2022 through February 2023. Selected the months of January 2023 and February 2023 for sample testing. No discrepancies were noted.
7. Reviewed 6 credit card statements from September 2022 through February 2023. Selected the months of January 2023 and February 2023 for sample testing. The CSD's observations were noted under the Other Observations section above.
8. Reviewed student body financial records from September 2022 through February 2023. No discrepancies were noted.

II. Review of 2022-2023 Fiscal Preparation Guide

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



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



- 24. The most current inventory listing for both capitalized and non-capitalized equipment, in Microsoft Excel format, including equipment description/type, brand/model, tag number, acquisition date, purchasing price, book value, asset life, and location of use was provided.
- 25. A link to the charter school’s website where the Education Protection Account (EPA) revenue and expenditures report pertaining to the prior fiscal year (i.e., 2021-2022) is posted (as required by Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution) was provided.
- 26. Links to the charter school’s website where the current (1) Audited Financial Statements, and (2) Local Control and Accountability Plan (LCAP) are posted (or the school’s assertion that its Audited Financial Statements are made available to members of the public) in accordance with Education Code section 47606.5(h) and/or LAUSD’s Charter School Transparency Resolution were provided.
- 27. Documents pertaining to the charter operator’s/school’s financing/borrowing activities were not provided as the charter school has indicated not applicable.
- 28. The charter school’s plan(s) for the purchase/new lease, relocation/expansion to new school site(s), facilities-related expansions, and/or major improvements to the existing and/or new school site(s) and pertinent documents with the following information, as appropriate were not provided as the charter school has indicated not applicable.
- 29. Disclosure of legal issues was not provided as the charter school has indicated not applicable.

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

N/A



Fiscal Operations Rubrics

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

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

<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].</i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].</i></p>
<p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net assets are positive in the prior two audits; 2. The cash balance at the beginning of the school year is positive; 3. The two most current annual independent audits show no material weaknesses, deficiencies, and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., California State Teachers’ Retirement System (CalSTRS), California Public Employees’ Retirement System (CalPERS), Fiscal Crisis & Management Assistance Team (FCMAT), United States Department of Education (USDE), California Department of Education (CDE), etc.), at the time of the oversight visit, show no outstanding material weaknesses, deficiencies, and/or findings; 5. Vendors and staff are consistently paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school consistently adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved 	<p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive; 3. The most current annual independent audit shows no material weaknesses, deficiencies and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., CalSTRS, CalPERS, FCMAT, USDE, CDE, etc.), at the time of the oversight visit, show outstanding findings, and the school is able to demonstrate evidence of remedies in addressing these findings; 5. Vendors and staff are generally paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p>
<p>LCAP submitted to the appropriate agencies, are posted on the charter school’s website;</p> <ol style="list-style-type: none"> 13. The LCAP is submitted to the appropriate agencies; 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are consistently processed or submitted by the charter school in a timely manner; 15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 16. If applicable (when audited and unaudited actuals do not mirror each other), adequate explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements; 17. Proper segregation of duties is consistently in place; 18. If applicable, there are no outstanding fiscal-related tiered intervention notices issued to the school; or the school has no tiered intervention notices as of the oversight report issuance date; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are fully met by the required deadline(s); or the school has no fiscal benchmarks in its current charter term. <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 uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses; 	<ol style="list-style-type: none"> 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are generally processed or submitted by the charter school in a timely manner; 15. There are no significant recurring issues cited in the Areas Noted for Further Growth and/or Improvement; 16. If applicable (when audited and unaudited actuals do not mirror each other), at least partial explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements; 17. Proper segregation of duties is generally in place; 18. If applicable, the charter school is in the process of resolving outstanding fiscal issues cited in a Notice issued by the CSD as part of its tiered intervention process; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are partially met by the required deadline(s). <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 uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);



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

<p><i>An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; net assets are negative with strong trend towards becoming positive (be positive at the end of the third year per the applicable interim financials); or the school's financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; 2. The cash balance at the beginning of the school year is positive; and 3. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term. <p>Note: Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p>	<p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Accomplished</i>, <i>Proficient</i>, or <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to mitigate the negative fiscal condition. The charter school's governing board members and/or leadership lack fiscal capacity.</p> <p>Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.</p> <p>Note: Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



*An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as **Developing** [Rating of 2].*

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

1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (<https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450>) per the most current audit (i.e., unrestricted fund balance divided by total expenditures);
2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses;
3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);
4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);
5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and
6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

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

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

New Schools:

New Schools:

REQUIRED CRITERIA

1. Interim reports and/or unaudited actuals project positive net assets;
2. Projected debt, if any, is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;
3. If enrollment is significantly below the enrollment per the school’s *Pupil Estimates for New or Significantly Expanding Charters* report and/or its approved petition budget, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised viable three-year budget and three-year cash flow projections;

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

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



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

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

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

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

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

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